

# Employer Self-Service (ESS) Training for Employers

Presented by PSERS' Employer Service Center, February/March 2018

# Objectives

- Learn how to access, navigate, and report your employees to PSERS using the ESS Browser system
- Identify new features available in ESS and how to use them
- Learn about Paperless Delivery

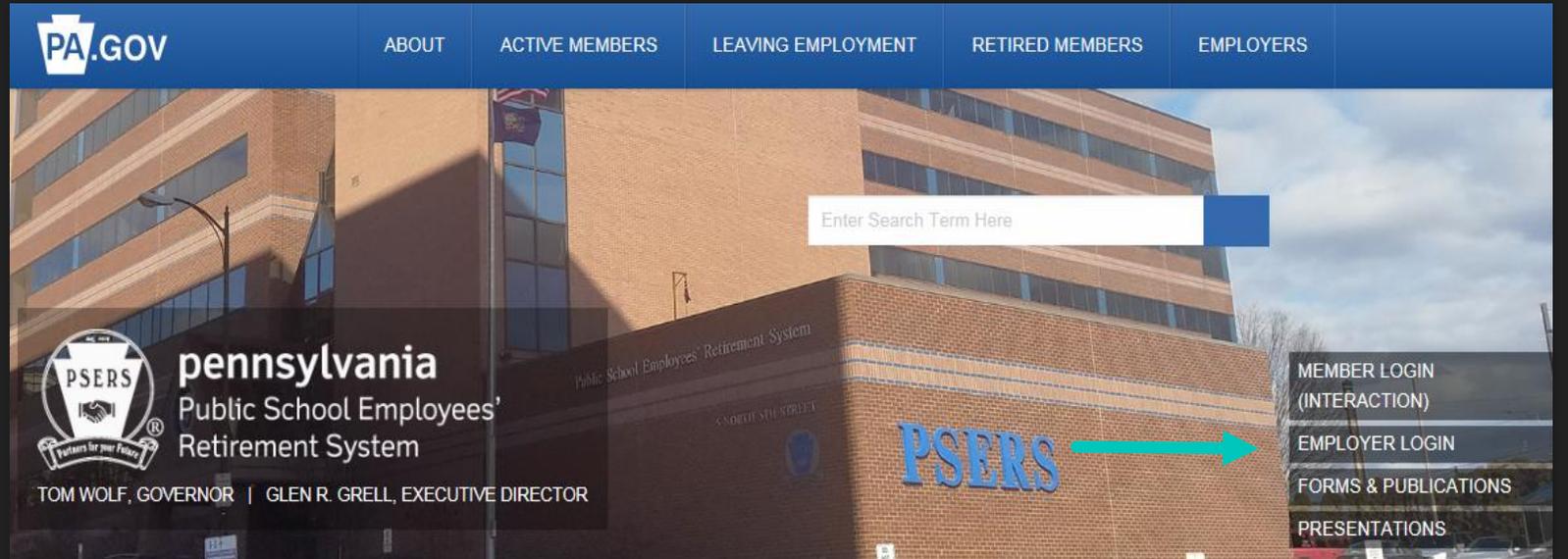
# Accessing ESS and Understanding your Dashboard Screen

ESS is a browser-based system that will replace the Employer Web portal that is currently used for PSERS reporting.

# How will I access ESS?

- The ESS Log in button will be on the right-hand side of the banner of the PSERS website in the same location as where you access the Employer Web currently.
- ESS works best with Google Chrome, but will work with other browsers.

[www.psers.pa.gov](http://www.psers.pa.gov)



# Log In Screen

 **pennsylvania**  
Public School Employees'  
Retirement System

User:

Password:

[Log In](#)

[Forgot User](#) | [Forgot Password](#)

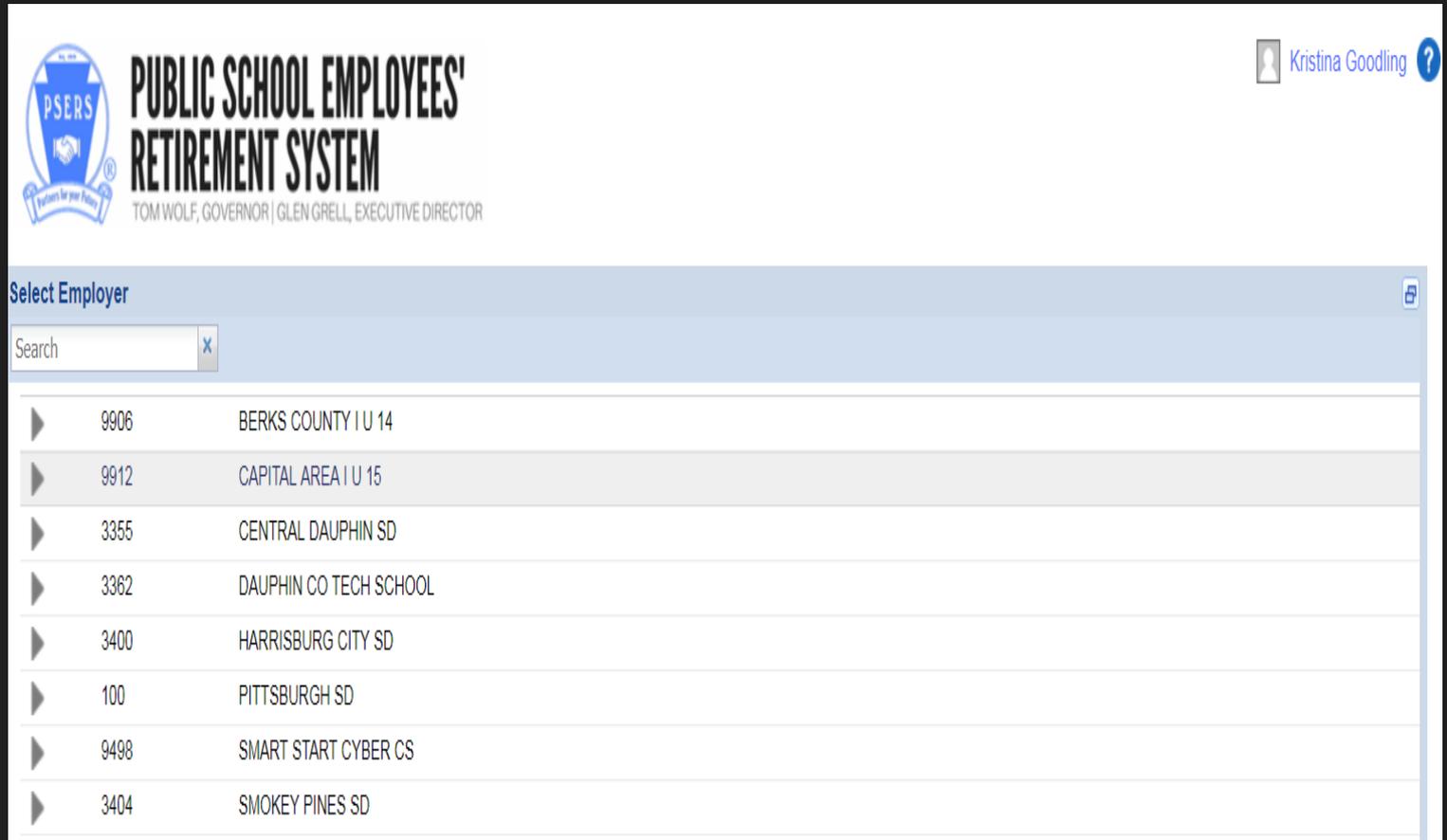
Version 10.0-ess  
V3PRD v 1.1761

**Vitech V3**

- User names and passwords will be converted if you have an **Administrator** account. We will speak more on this later.
- User accounts will need to be set up by your Administrator after ESS goes live.
- **New:** You will be required to change your password every 120 days when prompted by the system to ensure security.

# Schools assigned to you

- The PSERS logo will appear at the top left, while your log in information will appear at the top right.
- If you only report for one school, you be will defaulted directly to your dashboard.
- If you report for multiple schools, you will see them listed for you to select which school you would like to view. (This applies to management companies or schools where the payroll contact serves multiple schools.)



The screenshot shows the PSERS website interface. At the top left is the PSERS logo with the text 'PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM' and 'TOM WOLF, GOVERNOR | GLEN GRELL, EXECUTIVE DIRECTOR'. At the top right is the user profile 'Kristina Goodling' with a help icon. Below the header is a 'Select Employer' section with a search box and a list of schools. The list includes:

Employer ID	School Name
9906	BERKS COUNTY   U 14
9912	CAPITAL AREA   U 15
3355	CENTRAL DAUPHIN SD
3362	DAUPHIN CO TECH SCHOOL
3400	HARRISBURG CITY SD
100	PITTSBURGH SD
9498	SMART START CYBER CS
3404	SMOKEY PINES SD

# Your Dashboard



**PUBLIC SCHOOL EMPLOYEES'  
RETIREMENT SYSTEM**  
TOM WOLF, GOVERNOR | GLEN GRELL, EXECUTIVE DIRECTOR

3404-SMOKEY PINES SD

 Kristina Goodling

Home   Profile   Account   Roster   Documents   Contacts   Admin

## Quick Links

Generate Report  
Enroll an Employee  
Upload a New Payroll File  
Terminate a current Employee

## Web Links

Employer Reference Manual  
 PNC Cash Concentration  
 PSERS External Linking Policy

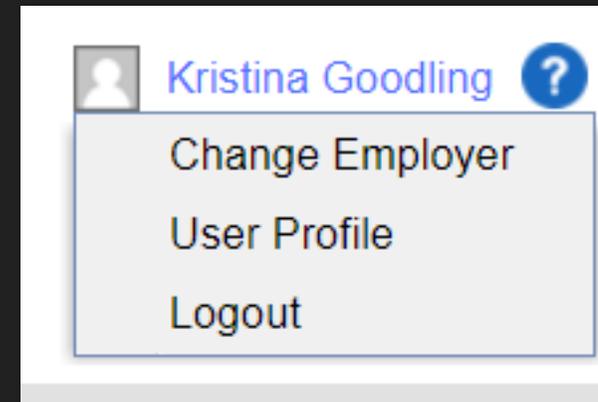
## Employer News

## Forms

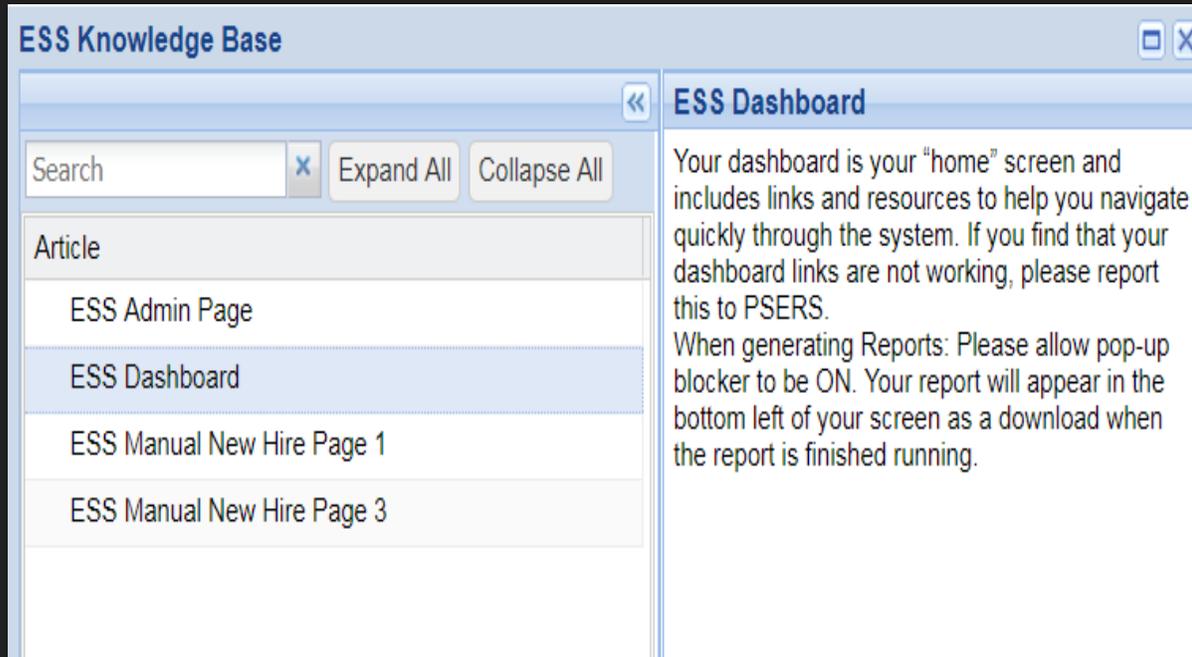
## Employer Alerts

# Information on Banner

- PSERS logo and your school name will appear on left side of the screen.
- On the right side of your screen will be your name (as the current logged in user) and the blue help text icon.
- Clicking on the silhouette will provide options for you to change employers, update your profile, and log out from the system.

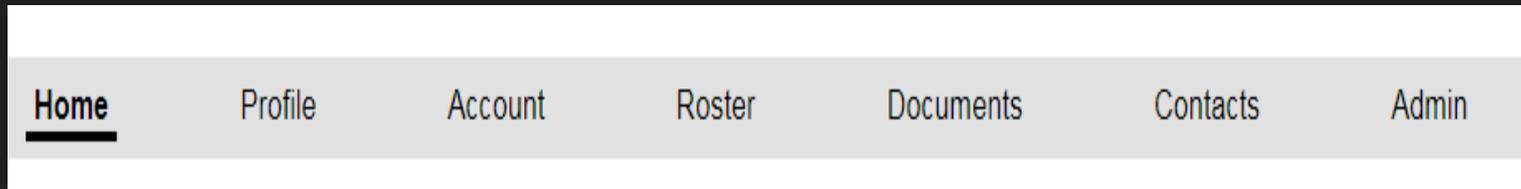


# Help Text



- Clicking the blue question mark help text icon will allow you to find helpful information about how to use ESS.
- You can search for specific information, or access the Article tabs down the left column. The relevant information will appear on the right.
- Using help text may answer some of your questions directly without the need to reach out to PSERS in order to continue your work reporting.

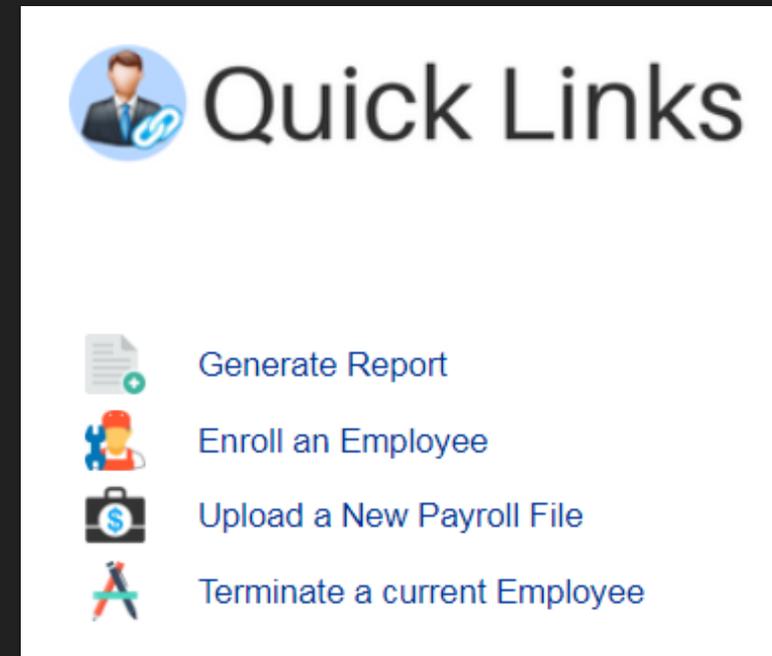
# Dashboard Tabs



- ESS offers tabs across the top of your screen to easily move from one area to another.
- Your Home tab will bring you back to your dashboard options. This includes Quick Links, Web Links, Employer News, Forms and Employer Alerts.

# Quick Links to your most used functions

- Generate Report will let you run four (4) types of reports.
- Enroll an Employee will take you to the Roster tab, specifically the Manual New Hire function.
- Upload a New Payroll File will take you to the Account tab.
- Terminate a Current Employee will take you to the Roster tab where you can create a new contract for your member.
- We'll touch on each of those sections in more detail later in this training.



# Web Links



- ⊕ Employer Reference Manual
- ⊕ PNC Cash Concentration
- ⊕ PSERS External Linking Policy

- Web Links includes links to PSERS public website to access the Employer Reference Manual and to the PNC Cash Concentration website.
- PSERS external Linking policy can also be found here.

# Employer News

- Employer News will give PSERS an opportunity to communicate with you through your dashboard for important information.



# PSERS Forms



## Forms

Questionnaire to determine the applicant's eligibil  
Authorization Agreement for Restricted (ACH) [E  
Approved Leave of Absence - Employer Verifica  
Service Adjustments (For Years 1977-2004)  
Charter School Employer Information  
PSERS Employer Security Administrator Autho  
PSERS Employer Security Administrator Autho

- PSERS most used forms can be found here, listed by form name.
- These are the same forms that are currently listed under the Employer tab of the website. The forms will also continue to be available through the public website.

# Employer Alerts



## Employer Alerts

### Comments

1 Delinquent Work Report - One or more Work Reports overdue.

- Employer Alerts will display notices to you about your work reporting.
- This may notify you of delinquent work reports (as seen on the left) or that there are adjustments that you have not yet been approved for your school.

# Profile Tab

Your main school address and contact information

# Profile Tab

- Your Profile tab will display your school's address and general contact information as well as your PSERS reporting unit code (Employer #)
- This tab will be in a read-only format for you, so if your school relocates the administrative office you will need to notify PSERS in writing so this information can be updated.

The screenshot shows the PSERS Profile Tab interface. At the top left is the PSERS logo with the text "PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM" and "TOM WOLF, GOVERNOR | GLEN GRELL, EXECUTIVE DIRECTOR". To the right of the logo is the text "9498-SMART START CYBER CS". In the top right corner, there is a user profile icon for "Kristina Goodling" with a question mark icon next to it. Below the header is a navigation menu with tabs: Home, Profile (which is underlined), Account, Roster, Documents, Contacts, and Admin. The main content area is titled "Employer Info" and contains a "Demographics" section. This section displays the following information:

Emp #:	9498	Employer Name:	SMART START CYBER CS
Correspondence:	123 STRAWBERRY SQAURE HARRISBURG PA 17101	Work Phone:	(999) 555-9876 Ext:
		Member-Provided Email:	kgoodling@pa.gov

# Roster Tab

Your Roster Tab is the work area for **Member Demographic** and **Contract Record** related information for your employees.

# Roster Tab

Home Profile Account **Roster** Documents Contacts Admin

Roster

Billing Location: 3404 SMOKEY PINES SD

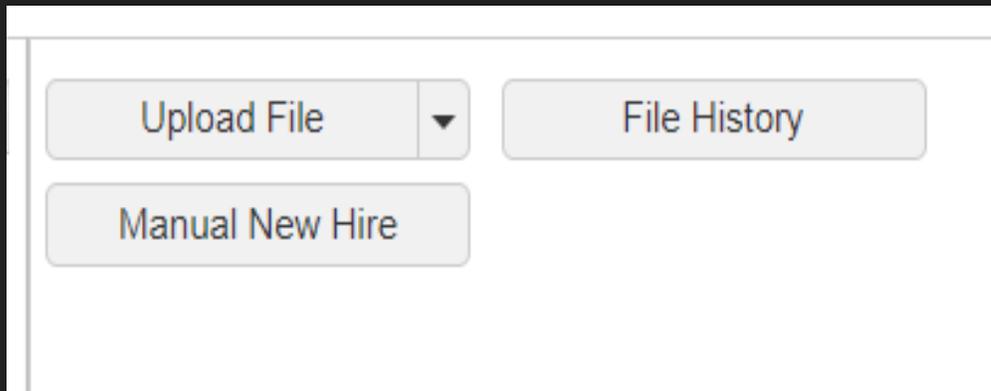
Search:

Contract Status: All

Tools	SSN	Member	Start Date	Stop Date	Work Status
<a href="#">Actions</a>	171-52-6547	BECKMEYER, MELISSA TEST ...	09/01/2017		ACTIVE - Acti...
<a href="#">Actions</a>	199-34-3268	BLUE WILLIAMS, SAMANTHA H	11/09/2017		ACTMLC - Act...
<a href="#">Actions</a>	199-34-3268	BLUE WILLIAMS, SAMANTHA H	10/01/2017	11/08/2017	ACTIVE - Acti...
<a href="#">Actions</a>	174-60-5501	CHERUP, JANET L	11/09/2017		DECESD - De...
<a href="#">Actions</a>	174-60-5501	CHERUP, JANET L	07/01/2017	11/08/2017	ACTIVE - Acti...
<a href="#">Actions</a>	169-70-8656	CONNELLY, KRISTEN Q	11/13/2017		EXCHGC - Ex...
<a href="#">Actions</a>	169-70-8656	CONNELLY, KRISTEN Q	07/01/2017	11/12/2017	ACTIVE - Acti...
<a href="#">Actions</a>	162-68-2406	GIBSON, KATHLEEN L	09/01/2017		ACTIVE - Acti...

- Your “roster” contains all persons who have been employed with your school and reported to PSERS going back to 1973.
- Your Billing Location should auto-populate your school name.
- The Search box will allow you to search for a full or partial first or last name, or SSN.
- Member Demographic and Contract Record update actions will take place using the Roster tab.

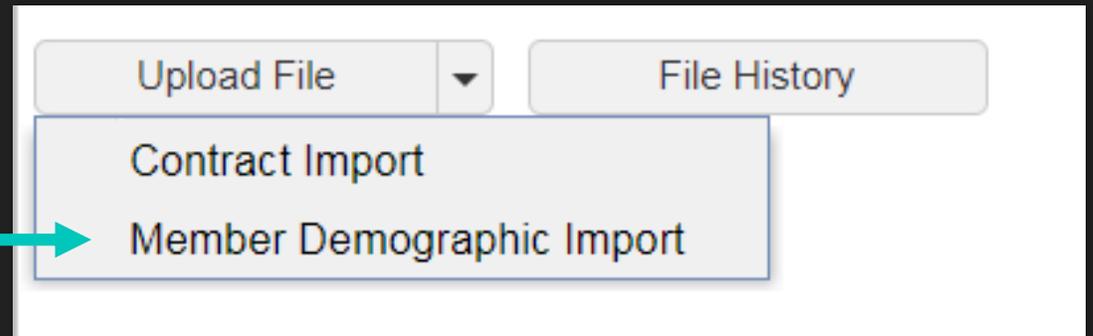
# Roster Tab-Available Actions



- The Upload File button arrow offers Contract Import or Member Demographic Import options. This button will walk you through the steps to import these types of files.
- The File History button serves as your work area and approved reports area all in one. Once your file has been imported into the system you will be able to see the status of your file and the number of rows imported. This screen will also show the number of invalid or exception rows to be corrected.
- **NEW:** The Manual New Hire button opens a 5-step wizard to enter a new employee's demographic record and the initial contract record all at once.

# Importing a Member Demographic File

- Select the Upload File button. Use the down arrow on this button to select Member Demographic Import.



# Importing a Member Demographic File

**1 File Upload** → **2 Processing**

Import Filename:  Browse...

Import Description:

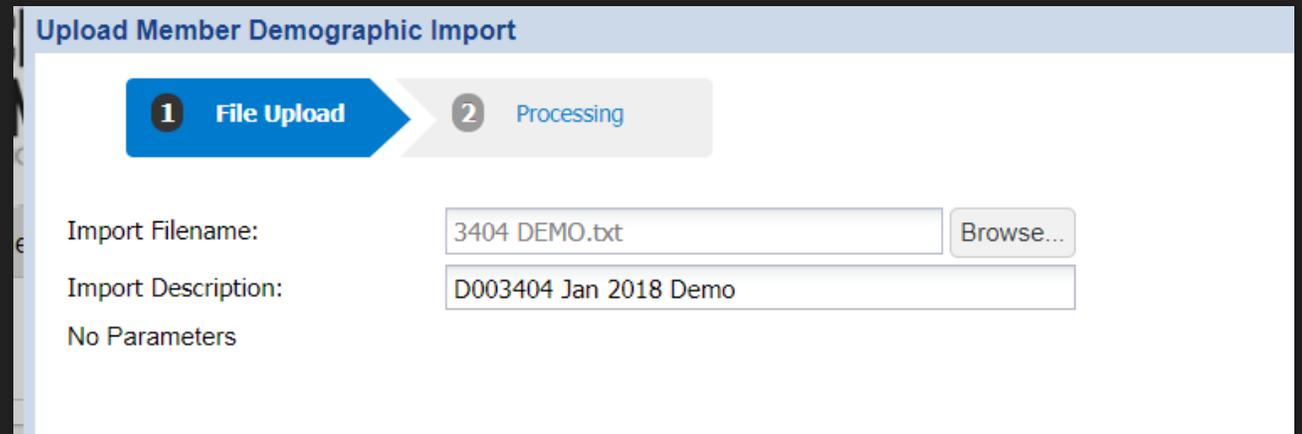
No Parameters

Cancel Next

- You will browse your computer files to locate the file you would like to import.
- The Import Description will auto-populate by showing “D003404” which represents a Demographic file for reporting unit code 3404.
- You can change this description to be more specific to include the month, year, or reason for uploading this file.
- When you successfully locate your file, click Next at the bottom right of your screen to move into the Processing phase.

# Selecting your file

- File selected will show in gray.
- Import Description updated to the entered description.
- Click the Next button in the bottom right corner. To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- A message stating “Processing file....Please wait” will display on your screen while processing.

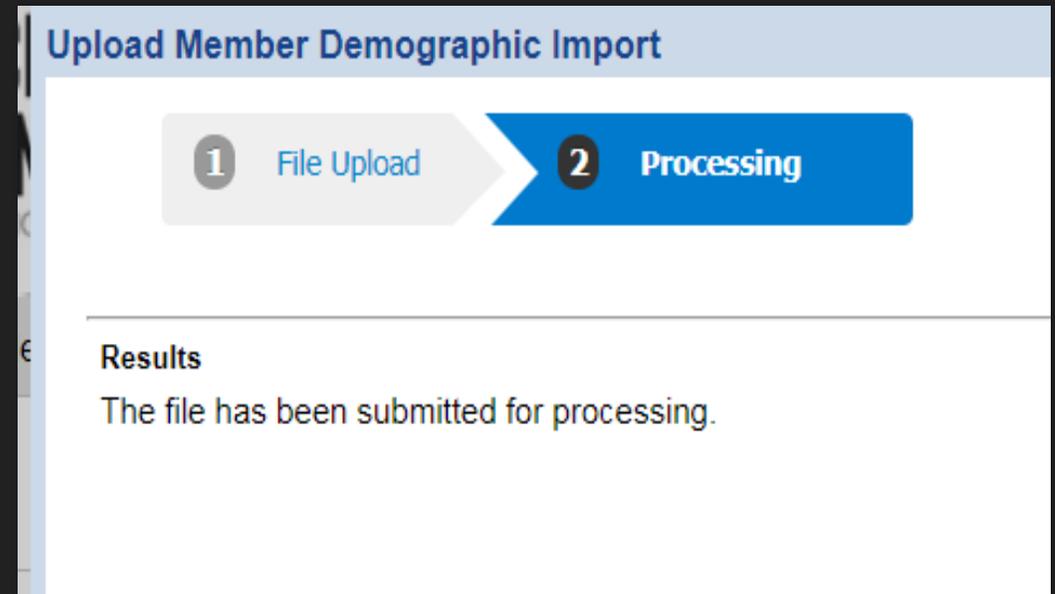


The screenshot shows a web form titled "Upload Member Demographic Import". At the top, there is a progress indicator with two steps: "1 File Upload" (highlighted in blue) and "2 Processing" (grayed out). Below the progress bar, the form contains the following fields:

- Import Filename:** A text input field containing "3404 DEMO.txt" and a "Browse..." button to its right.
- Import Description:** A text input field containing "D003404 Jan 2018 Demo".
- No Parameters:** A label indicating that no parameters are required for this import.

# Processing

- After the “Processing file...please wait” message, the screen will show your file results.
- You can view the details of your file using the Details button in the bottom right corner.



Upload Member Demographic Import

1 File Upload

2 Processing

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**Results**  
The file has been submitted for processing.

# Processing a Member Demographic File

**Details**

Save Cancel

File Type Member Demographic Import File Load Date 01/03/2018  
Import Description D003404 Jan 2018 Demo

Summary **Details**

Import Detail Status: All Exception Filter: All Display Rows: From

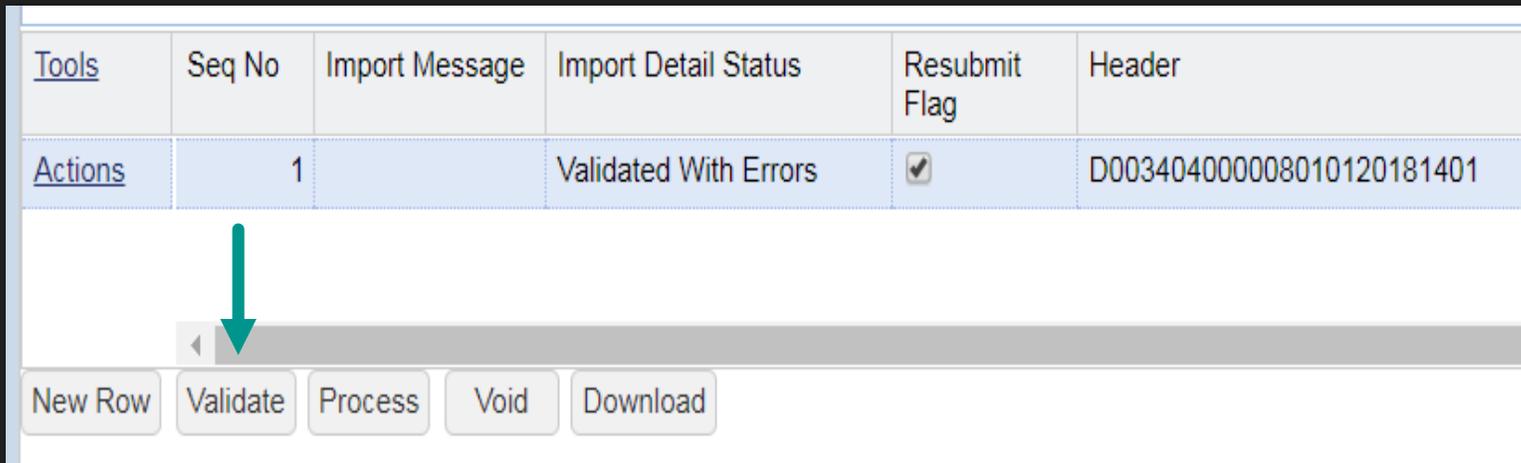
Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
<a href="#">Actions</a>	1		Validated With Errors	<input checked="" type="checkbox"/>	A003404000008010120181401

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	SSN	Last Name	First Name
<a href="#">Actions</a>	2	Not Processed	<input checked="" type="checkbox"/>		435010001	YELLOW	JANE
<a href="#">Actions</a>	3	Not Processed	<input checked="" type="checkbox"/>		435010002	PINK	JOHN
<a href="#">Actions</a>	4	Not Processed	<input checked="" type="checkbox"/>		435010003	ORANGE	SALLY
<a href="#">Actions</a>	5	Not Processed	<input checked="" type="checkbox"/>		435010004	GREEN	CURTIS

- ESS will automatically put you into Edit mode to make corrections to your file.
- **NEW:** Header row errors will need to be fixed by employers. In the example, this file was Validated with Errors. To continue, the header row must be corrected.
- In this example, the Demographic file header line should begin with “D” rather than A, and has caused the error.

# Fixing the Header Row



The screenshot shows a table with the following columns: Tools, Seq No, Import Message, Import Detail Status, Resubmit Flag, and Header. The first row is highlighted in blue and contains the following data: Actions, 1, Validated With Errors, a checked checkbox, and the header value D003404000008010120181401. Below the table, there is a toolbar with buttons for New Row, Validate, Process, Void, and Download. A green arrow points to the Validate button.

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated With Errors	<input checked="" type="checkbox"/>	D003404000008010120181401

Buttons: New Row, Validate, Process, Void, Download

- Chapter 18 (File Formats) of the Employer Reference Manual explains the requirements for properly formatted files, including the header row details.
- By correcting the header row to start with “D”, we are able to click the Validate button to see if the correct correction was made.
- **TIP:** If the text appears to be correct but an error still shows, it may be caused by extra spaces behind the text that need to be cleared out.

# Validating Your File

- Once the header is corrected and validated, the Import Detail Status will change to Validated Successful.
- The rows on your previously unprocessed file will now show an Import Detail Status showing which rows are Successful, Validated with Exceptions, or Validated with Errors.
- The Exception Filter can be used to show similar errors. You will need to be in Edit mode to use the filter. The Edit button is at the top left of the screen.

**Details**

Edit Close

File Type Member Demographic Import File Load Date 01/03/2018  
Import Description D003404 Jan 2018 Demo

Summary **Details**

Import Detail Status: All Exception Filter: All

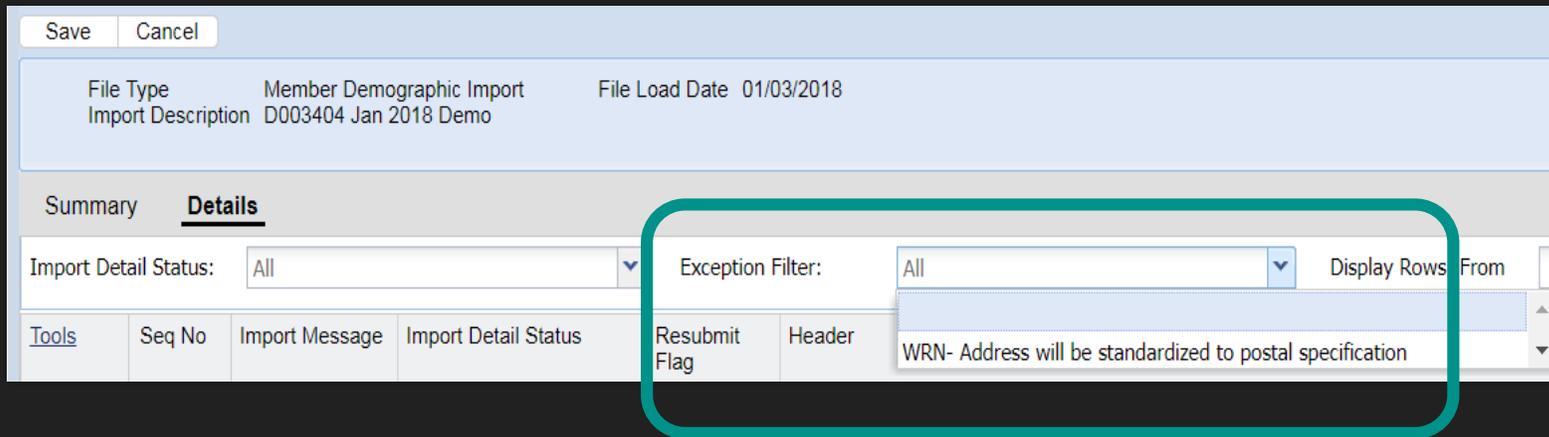
<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
<a href="#">Actions</a>	1		<u>Validated Successful</u>	<input checked="" type="checkbox"/>	D003404000008010120181401

New Row Validate Process Void Download

<a href="#">Tools</a>	Seq No	Import Detail Status	Resubmit Flag	Name	SSN	Last Name
<a href="#">Actions</a>	2	Validated With Exceptions	<input checked="" type="checkbox"/>	YELLOW, JANE	435010001	YELLOW
<a href="#">Actions</a>	3	Validated With Exceptions	<input checked="" type="checkbox"/>	PINK, JOHN	435010002	PINK
<a href="#">Actions</a>	4	Validated Successful	<input checked="" type="checkbox"/>	ORANGE, SA...	435010003	ORANGE
<a href="#">Actions</a>	5	Validated Successful	<input checked="" type="checkbox"/>	GREEN, CUR...	435010004	GREEN

Page 1 of 2

# Exception Filter



Save Cancel

File Type Member Demographic Import File Load Date 01/03/2018  
Import Description D003404 Jan 2018 Demo

Summary **Details**

Import Detail Status: All Exception Filter: All Display Rows From

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
					WRN- Address will be standardized to postal specification

- When in edit mode, use the pull down arrow to see Exception/Invalid errors that need to be corrected.
- For the demographic file, there is only one exception (Warning) that the address will be standardized to postal specification.
- Click on the exception you would like to filter by.

# Exceptions and Errors

Import Detail Status:  Exception Filter:

<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>	D003404000008010120181401

<a href="#">Tools</a>	Seq No	Import Detail Status	Resubmit Flag	Name	SSN	Last Name	First Name	M
<a href="#">Actions</a>	2	Validated With Exceptions	<input checked="" type="checkbox"/>	YELLOW, JANE	435010001	YELLOW	JANE	
<a href="#">Actions</a>	3	Validated With Exceptions	<input checked="" type="checkbox"/>	PINK, JOHN	435010002	PINK	JOHN	
<a href="#">Actions</a>	8	Validated With Exceptions	<input checked="" type="checkbox"/>	BLUE, DEB	435010007	BLUE	DEB	
<a href="#">Actions</a>	9	Validated With Exceptions	<input checked="" type="checkbox"/>	BLACK, LINDA	435010008	BLACK	LINDA	

Page 1 of 1

- All rows with the exception/invalid error chosen will display below. This example shows 4 rows.
- If there are many rows with this error, there will be additional pages listed in the bottom left of your screen.
- In the bottom right of your screen you may change the number of records visible per page. The default value for this page is 15 records.

# Reviewing exceptions/error rows

New Row Validate Process Void Download													
<a href="#">Tools</a>	Last Name	First Name	Mid...	Suffix	Sex	Birth Date	Care Of	Apartment	Street	City	State	Zip	Country
<a href="#">Actions</a>	YELLOW	JANE			Female	10101980			42 MARKET STREET	HARRISBURG	Pennsylvania	17101	UNITED STAT...
<a href="#">Actions</a>	PINK	JOHN			Male	09151972			31 SPOONER STREET	HARRISBURG	Pennsylvania	17101	UNITED STAT...
<a href="#">Actions</a>	BLUE	DEB			Female	11121993			1 MAIN STREET	HARRISBURG	Pennsylvania	17101	UNITED STAT...
<a href="#">Actions</a>	BLACK	LINDA			Female	10031973			2 NORTH STREET	HARRISBURG	Pennsylvania	17101	UNITED STAT...

- The address will be standardized by US Postal Service guidelines. In some cases, the system may prompt for the last four digits of the zip code also. Other errors may include incorrect birthdates, or perhaps information that ended up in an incorrect field that does not pass the system validations.
- From left to right, each row will contain all details of a member's demographic record that was submitted on the file. Not visible on this screen shot, the row also shows the phone numbers and email contact information that was entered on the demographic file.

# Editing the Record

- When in edit mode, you can click inside the incorrect field and enter changes directly into the row. “Market Street” was edited to show upper and lower case letters.
- When finished, click Save at the top left. You may save in between each change, or after all changes have been made.
- If you choose to save after each record, you will need to click the Edit button to make the next change.
- Click Validate for the system to review the file again. Only exceptions/errors not fixed should remain after the file is re-validated.

		42 Market Street	HARRISBURG	Penn
		31 SPOONER STREET	HARRISBURG	Penn

# Processing the file

- Use the Close button at the top left when changes are complete for your file.
- This will default you to the File History screen.
- Using the Actions button at the beginning of the transaction row, select Process after your file has been Validated a final time.

Actions	400652	Validated	01/03/2018	Member Dem...	D003404 Jan ...	Validated with Exceptions
Validate						
Details						
Process						
Void						
Download						

# Processing Completed

**File History**

Close

Report Type: All Date Range: 11/06/2017 To: 01/05/2018

Status: All

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration
<a href="#">Actions</a>	400655	Validated	01/04/2018	Contract Import	C003404 Jan ...	Validated with Errors	01/04/2018	01/04/2018	3 sec
<a href="#">Actions</a>	400652	Completed	01/03/2018	Member Dem...	D003404 Jan ...	Processed with Exceptions	01/03/2018	01/05/2018	11 sec

- When the Process action is clicked, ESS will begin to process the file. The Process Flag will go through a series of messages while this is happening: "Queued Processing," then "Processing," and finally "Completed".
- The Status of the Demographic file imported is now "Processed with Exceptions", due to the standardization exception from earlier.

Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By	Comments
8	0	0	8	0			KRGOODLING	
8	8	4	0	4			KRGOODLING	

- The File History page serves as the work area and approved reports area.
- On the last slide the status of the demographic file was visible. Further to the right, details about the rows imported and processed as well as any valid, invalid or exception rows will be listed.
- The dark blue row shows that the demographic file was processed with 8 rows, 4 of which were valid, 4 of which were processed with an exception.
- Rows added to and deleted from the file will also be visible from this screen.

# Manual New Hire Button

A **NEW** feature that allows manual entry of the **demographic record and contract record within one function** for newly hired employees.

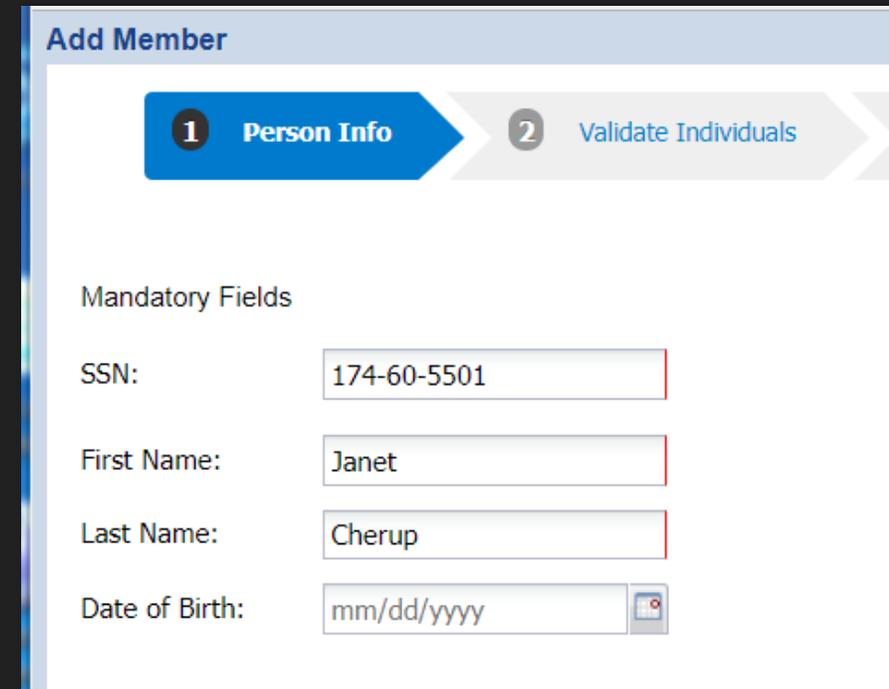
# Manual New Hire Button

- If you manually enter your new hires rather than using file imports, you will use the Manual New Hire button.
- This 5-step feature should be used for new employees as it combines the demo and contract information in one process.
- For step one, mandatory information fields have a red bar down the right side. This part of the wizard looks to see if this person has been an employee for your school in the past.
- After mandatory information is entered, click the Search button (not in screen shot) at the bottom right of the screen.

The screenshot displays a web-based wizard titled "Add Member". At the top, a progress bar shows five steps: 1. Person Info (highlighted in blue), 2. Validate Individuals, 3. Member Demographics, 4. Process Employer Enrollment, and 5. Confirmation. Below the progress bar, the "Mandatory Fields" section contains four input fields: SSN, First Name, Last Name, and Date of Birth. Each of these fields has a red vertical bar on its right side, indicating they are required. The Date of Birth field includes a calendar icon for date selection.

# Step 1-Person Info

- SSN can be entered with or without dashes.
- First and last name should be entered, but Date of Birth is not required.
- To be found, this employee's information must be an exact match to the information already in the system.
- PSERS suggests using all CAPS when entering the first and last name when using the manual demo process.

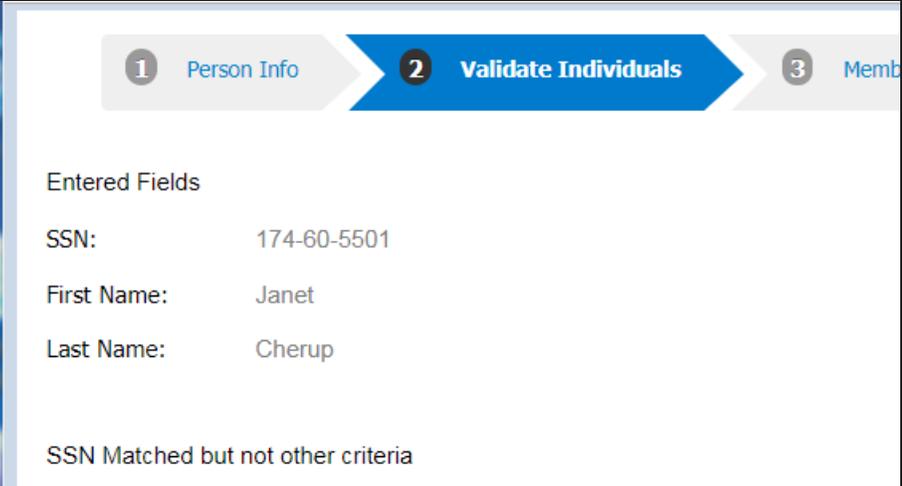


The screenshot shows a web interface for adding a new member. At the top, there is a header 'Add Member' and a progress indicator with two steps: '1 Person Info' (highlighted in blue) and '2 Validate Individuals'. Below the progress indicator, there is a section titled 'Mandatory Fields' with four input fields: 'SSN:' containing '174-60-5501', 'First Name:' containing 'Janet', 'Last Name:' containing 'Cherup', and 'Date of Birth:' containing 'mm/dd/yyyy' with a calendar icon to its right.

Mandatory Fields	
SSN:	<input type="text" value="174-60-5501"/>
First Name:	<input type="text" value="Janet"/>
Last Name:	<input type="text" value="Cherup"/>
Date of Birth:	<input type="text" value="mm/dd/yyyy"/> 

# Step 2-Validate Individuals

- If the demo information entered is not an exact match, ESS will tell you.
- For this example, the SSN matches, but the name (first or last) may be spelled incorrectly.
- ESS will not let you continue with the information as is. Your options are to cancel the transaction or select the back button to fix your information. These buttons will be visible at the bottom of your screen.



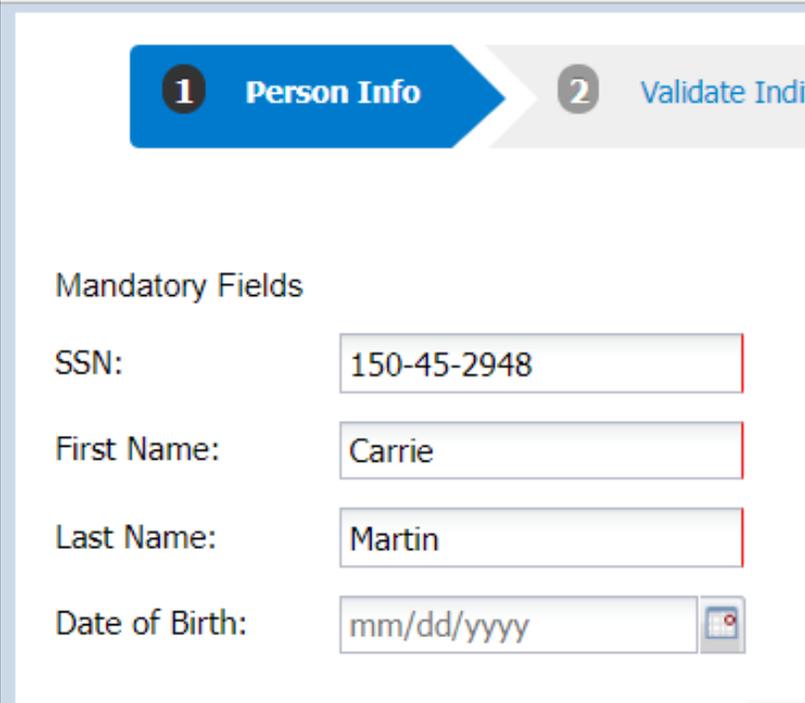
The screenshot shows a three-step process bar at the top: 1 Person Info, 2 Validate Individuals (highlighted in blue), and 3 Memb. Below the bar, the 'Entered Fields' section displays the following information:

SSN:	174-60-5501
First Name:	Janet
Last Name:	Cherup

At the bottom of the screen, a message reads: 'SSN Matched but not other criteria'.

# Back to Step 1-Person Info

- Re-enter demographic information and use the Search button at the bottom right of your screen.



1 Person Info

2 Validate Indi

Mandatory Fields

SSN:

First Name:

Last Name:

Date of Birth:  

# Step 2-Validate Individuals

1 Person Info

2 **Validate Individuals**

3 Member Demographics

Entered Fields

SSN: 150-45-2948

First Name: Carrie

Last Name: Martin

This member is not found.

- This time, our new employee did not match any existing member in ESS.
- At the bottom of your screen you will have buttons available to Cancel the transaction, go Back and re-enter information in Step 1 (Person Info), or click the New Member button to proceed to Step 3 - Member Demographics.

# Step 3-Member Demographics

- Step 3 prompts you to enter all demographic information about the member. This includes their name, Residence Address, Date of Birth, Gender, Employer-Provided Email, Phone and Fax Numbers.
- Mandatory fields show the red bar and are auto-populated from our prior steps, but it is preferable to capture all information possible at this time.

**Demographics**

Prefix:  ▼

First Name:

Middle Name:

Last Name:

Suffix:  ▼

Residence:

SSN:

Date of Birth:

Gender:  ▼

Employer-Provided Email:

Day Phone:  Ext:

Evening Phone:  Ext:

Other Phone:  Ext:

Member-Provided Email:

Fax:

# Adding the Address

- Click inside the Residence box to enter the address.
- Once open, ESS will auto-populate the county and the effective date (current date).
- Enter the zip code. The City and State will auto-populate based on the zip code you enter.



**New Residence Address**

OK Cancel Copy

Country: UNITED STATES OF AM

Zip: 17101

Street:

Apt./Suite#:

Care Of:

City: HARRISBURG

State: Pennsylvania

County: DAUPHIN

Effective Date: 12/29/2017

# Completing the address

- You no longer need to spell out the last word of the address (Ex: Street, Avenue, Drive, etc)
- ESS is designed to shorten only the last word according to US Postal guidelines.
- After street address is entered, click the OK button at the top left of the New Residence Address Box.



**New Residence Address**

OK Cancel Copy

Country: UNITED STATES OF AM

Zip: 17101

Street: 5 North 5th Street

Apt./Suite#:

Care Of:

City: HARRISBURG

State: Pennsylvania

County: DAUPHIN

Effective Date: 12/29/2017

# Finish Demographic Info

1 Person Info   2 Validate Individuals   **3 Member Demographics**   4 Process Employer Enrollment   5 Confirmation

### Demographics

Prefix:	<input type="text"/>	SSN:	<input type="text" value="150-45-2948"/>
First Name:	<input type="text" value="Carrie"/>	Date of Birth:	<input type="text" value="01/01/1960"/>
Middle Name:	<input type="text"/>	Gender:	<input type="text" value="Female"/>
Last Name:	<input type="text" value="Martin"/>	Employer-Provided Email:	<input type="text" value="carriemartin@nodomain.co"/>
Suffix:	<input type="text"/>	Day Phone:	<input type="text" value="(717) 899-9009"/> Ext: <input type="text"/>
Residence:	<input type="text" value="5 NORTH 5TH ST&lt;br/&gt;HARRISBURG PA 17101"/>	Evening Phone:	<input type="text" value="(717) 339-4400"/> Ext: <input type="text"/>
		Other Phone:	<input type="text"/> Ext: <input type="text"/>
		Member-Provided Email:	<input type="text"/>
		Fax:	<input type="text"/>

- Finish entering demographic info.
- Date of Birth will require 8 numbers (MM/DD/YYYY) but does not require slashes when entering.
- **Employer-provided email** is a field where you can enter an email address for your employee. This does not need to be their school email address.
- **Member-Provided Email** is not a field that can be saved by employers. This should be entered by the member through the Member Self-Service (MSS) system.
- Click Next at the bottom right of your screen to continue.

# Step 4-Process Employer Enrollment

- Step 4 guides you through creating the employee's initial contract record.
- Job Titles are specific to titles your school has used for employees in the past. This list is organized alphabetically. Select a title from this list.
- Mandatory fields are marked with the red bar.
- Fields such as the End Date, BOC Flag, Service Flag, and BOC Svc Report date are not needed when creating a new ACTIVE contract.

**Add Member**

1 Person Info → 2 Validate Individuals → 3 Member Demographics → **4 Process Employer Enrollment** → 5 Confirmation

**First Name:** Carrie    **Last Name:** Martin    **SSN:** 150-45-2948    **Birth Date:** 01/01/1960

Job Title:	<input type="text" value="CAFETERIA WORKER"/>	Employment Type:	<input type="text" value="Part-Time"/>
Wage Type:	<input type="text" value="Hourly"/>	Work Status:	<input type="text" value="ACTIVE - Actively Working"/>
Start Date:	<input type="text" value="12/29/2017"/>	End Date:	<input type="text" value="mm/dd/yyyy"/>
Expected Months:	<input type="text" value="10"/>	Expected Units:	<input type="text" value="1,100"/>
Voting Status:	<input type="text" value="Non-Certified"/>	Contract Status:	<input type="text" value="Eligible"/>
BOC Flag:	<input type="text"/>	Service Flag:	<input type="text"/>
BOC Svc Rpt:	<input type="text" value="mm/dd/yyyy"/>		

# Step 4-Process Employer Enrollment cont.

- Carrie is a PT/Hourly Cafeteria worker. Her PT expected units are entered as 10 months/1100 hours. Her position does not require certification from the Department of Education, so her Voting Status is Non-Certified.
- **NEW:** Contract Status is a new field that needs to be entered by employers. The “Eligible” status should be selected unless an employee is being entered as **ACTIVW-Waiver Request**. A waiver would require the “Pending Waiver” contract status instead.
- Click the Next button at the bottom right of your screen to continue to the final step of the process.

**Add Member**

1 Person Info → 2 Validate Individuals → 3 Member Demographics → **4 Process Employer Enrollment** → 5 Confirmation

First Name: Carrie    Last Name: Martin    SSN: 150-45-2948    Birth Date: 01/01/1960

Job Title:	CAFETERIA WORKER	Employment Type:	Part-Time
Wage Type:	Hourly	Work Status:	ACTIVE - Actively Working
Start Date:	12/29/2017	End Date:	mm/dd/yyyy
Expected Months:	10	Expected Units:	1,100
Voting Status:	Non-Certified	<b>Contract Status:</b>	<b>Eligible</b>
BOC Flag:		Service Flag:	
BOC Svc Rpt:	mm/dd/yyyy		

# Step 5: Confirmation

- Carefully review your employee's demographic and contract information for errors or typos before clicking the confirm button in the bottom right corner.
- Once confirmed, your employee can be reported on the next work history report.

### Add Member

- 1 Person Info
- 2 Validate Individuals
- 3 Member Demographics
- 4 Process Employer Enrollment
- 5 Confirmation

Individual Information		Employment Information	
SSN:	150-45-2948	Job Title:	CAFETERIA WORKER
First Name:	Carrie	Employment Type:	Part-Time
Date of Birth:	01/01/1960	Wage Type:	Hourly
Last Name:	Martin	Work Status:	ACTIVE - Actively Working
Gender:	Female	Start Date:	12/29/2017
Employer-Provided Email:	carriemartin@nodomain.com	Expected Months:	10
Day Phone:	(717) 899-9009	Expected Units:	1100
Evening Phone:	(717) 339-4400	Voting Status:	Non-Certified
Residence:	5 NORTH 5TH ST HARRISBURG PA 17101	Contract Status:	Eligible

# After confirmation....

[Back](#) Name: MARTIN, CARRIE      DOB: 01/01/1960      SSN: 150-45-2948

[Change](#)

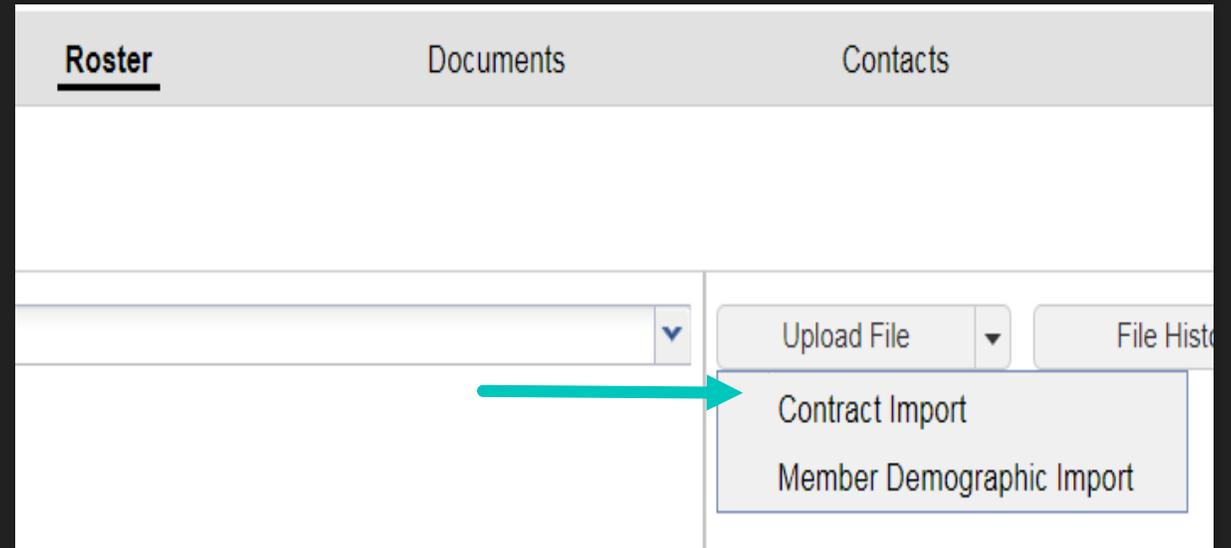
**Demographics**

Prefix:		SSN:	150-45-2948
First Name:	CARRIE	PSERS ID:	9115954
Middle Name:		Date of Birth:	01/01/1960
Last Name:	MARTIN	Gender:	Female
Suffix:		Employer-Provided Email:	carriemartin@nodomain.cor
Residence:	5 NORTH 5TH ST HARRISBURG PA 17101	Day Phone:	(717) 899-9009      Ext:
		Evening Phone:	(717) 339-4400      Ext:

- After the Confirm button is clicked, ESS will show a message stating “Enrolling” while it processes your request.
- If any changes need to be made, you may use the Change button in the top left corner.
- Use the Back button on the blue banner to return to the main Roster page.

# Uploading a Contract Record File

- From Roster tab, use the Upload File button and select the pull down arrow Contract Import option.



# Importing a Contract Record File

**Upload Contract Import**

1 File Upload 2 Processing

Import Filename:  Browse...

Import Description: C003404

No Parameters

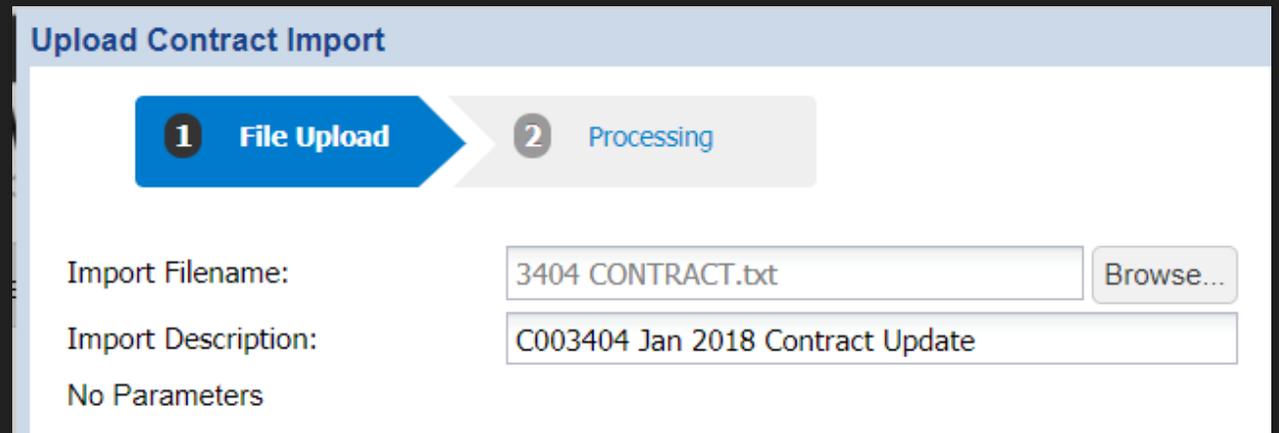
Uploading a Contract Record File

Cancel Next

- You will browse your computer files to locate the file you would like to import.
- The Import Description will auto-populate by showing “C003404” which represents a Contract Record file for reporting unit code 3404.
- You can change this description to be more specific to include the month, year, or reason for uploading this file.
- When you successfully locate your file, click Next at the bottom right of your screen to move into the Processing phase.

# Selecting Your File

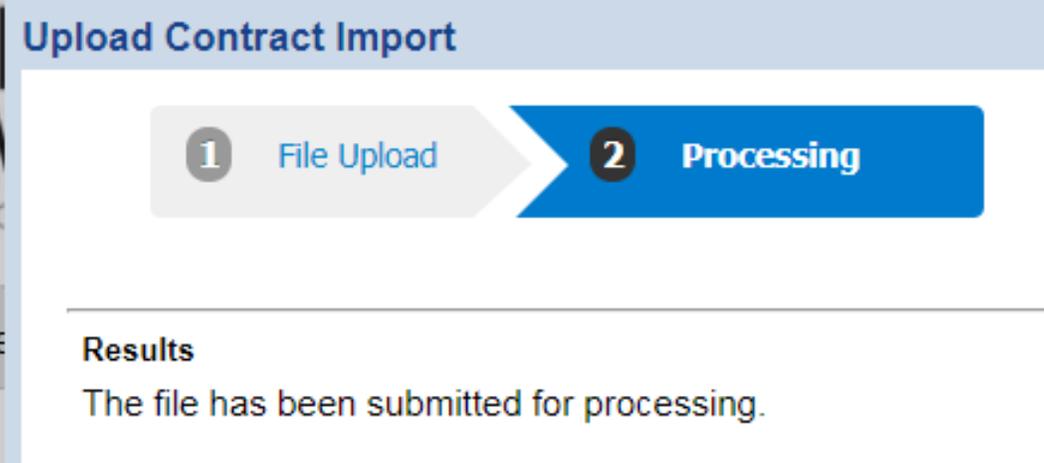
- File selected will show in gray.
- Import Description updated to my preference.
- To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- To proceed, click the Next button in the bottom right corner. A message stating “Processing file....Please wait” will display on your screen while processing.



The screenshot shows a web interface titled "Upload Contract Import". At the top, there is a progress bar with two steps: "1 File Upload" (highlighted in blue) and "2 Processing" (grayed out). Below the progress bar, there are three input fields: "Import Filename:" with the value "3404 CONTRACT.txt" and a "Browse..." button; "Import Description:" with the value "C003404 Jan 2018 Contract Update"; and "No Parameters".

# Processing

- After the “Processing file...please wait” message, the screen will show your file results.
- You can view the details of your file using the Details button in the bottom right corner, which we used for the Demographic File.
- If you click the Close button in the bottom left, you can also use the File History button on the Roster page to view your file details.



**Upload Contract Import**

1 File Upload → 2 Processing

---

**Results**  
The file has been submitted for processing.

# File History button

File History

Close

Report Type: All Date Range: 11/05/2017 To: 01/04/2018

Status: All

<u>Tools</u>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Rows Processed
<u>Actions</u>	400655	Ready	01/04/2018	Contract Import	C003404 Jan ...	Validated with ...	01/04/2018			8	0
<u>Actions</u>	400652	Validated	01/03/2018	Member Dem...	D003404 Jan ...	Validated with ...	01/03/2018	01/04/2018	5 sec	8	8

- The File History button serves as your work area and approved reports area. You can sort by Report Type, Date Range, or report Status.
- You can see the Demographic file that was validated earlier and the Contract Import that was just processed.
- To get to the Details of our Contract Import, you will use the Action button at the beginning of that row.

# File History Action Button

- Click the Actions button for the Contract Import File.
- From the Actions button, you can Validate the file, view the Details where you can view/correct errors, Process the file, Void the file, or Download the file.
- First, we need to Validate the file.
- As the validation occurs, the Process Flag will read "Queued Validation".
- After the file is Validated, the status will change and the duration will populate.

<u>Tools</u>	Import Header Id	Process Flag	Inserted Date	Report Type
<u>Actions</u>	400655	Ready	01/04/2018	Contract Import
Validate	400652	Validated	01/03/2018	Member Dem...
Details				
Process				
Void				
Download				

# Contract Import Validated

File History

Close

Report Type: All Date Range: 11/06/2017 To: 01/05/2018

Status: All

<a href="#">Tools</a>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported
<a href="#">Actions</a>	400655	Validated	01/04/2018	Contract Import	C003404 Jan ...	Validated with Errors	01/04/2018	01/05/2018	3 sec	8
<a href="#">Actions</a>	400652	Completed	01/03/2018	Member Dem...	D003404 Jan ...	Processed with Exceptions	01/03/2018	01/05/2018	11 sec	8

- The Contract Import file shows a Process Flag of Validated and a Status of “Validated with Errors” meaning there are rows that need to be corrected before processing the file.

# Work Area for Contract Import

**File History**

Close

Report Type: All Date Range: 11/06/2017 To: 01/05/2018

Status: All

<a href="#">Tools</a>	Id Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By
<a href="#">Actions</a>	118	01/05/2018	3 sec	8	7	6	1	1			KRGOODLING

- The Contract Import imported 8 rows but only 6 rows are Valid. The file history screen shows that there is 1 Invalid row and 1 Exception row that should be corrected before the file is processed.
- To view the details of the file, use the Actions button at the start of the row.

# Contract Import Details

**File History**

Close

Report Type: All Date Range:

Status: All

<u>Tools</u>	Import Header Id	Process Flag	Inserted Date	Report Type
<u>Actions</u>	400655	Validated	01/04/2018	Contract Import
	400652	Completed	01/03/2018	Member Dem...

- Validate
- Details
- Process
- Void
- Download

- Click Details to view the transaction rows and to use the exception filter to correct errors for the Contract Import file.

# Exception Filter

File Type Contract Import File Load Date 01/04/2018  
Import Description C003404 Jan 2018 Contract Update

Summary **Details**

Import Detail Status: All Exception Filter: All Display Rows: F

	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
ns	1		Validated Successful	<input checked="" type="checkbox"/>	C003404000

ERR- Date of birth does not match existing record  
WRN- Expected units should be 900-2600

- Use the Exception Filter arrow to show exceptions for the contract import file.
- There are two listed; an “ERROR-Date of birth does not match existing record” and a “WARNING-Expected units should be 900-2600.”
- Invalid records will display as an ERROR (ERR).
- Exception records will display as a WARNING (WRN).
- If there were a longer list, you would use the scroll bar on the right side of the drop down menu to view all invalid/exception errors.

# Fixing Error

Import Detail Status: All Exception Filter: ERR- Date of birth does not match existi Display Rows: From To:

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated Successful	☑	C003404000008010120181401

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	SSN	Last Name	First Name	Birth Date	Job Title	Employment ...	Wage Type
Actions	9	Validated With Errors	☑		435010008	BLACK	LINDA	10032003	TEACHER	Full-Time	Salaried

- The ESS system validations found that there was an error with the Birth Date for Linda Black.
- If the incorrect Birth Date was a typographical error, please correct within the transaction row.
- This member's Birth Date should be corrected to show 10/03/1973 instead. While in edit mode, click inside the Birth Date field to correct the year to show 1973. Then click the Save button at the top left. Click the Edit button to move to the next correction.

# Correcting Expected Units

New Row Validate Process Void Download											
<u>Tools</u>	Last Name	First Name	Birth Date	Job Title	Employment ...	Wage Type	Work Status	Start Date	End Date	Expected Months	Expected Units
<u>Actions</u>	YELLOW	JANE	10101980	TEACHER	Full-Time	Hourly	ACTIVE - Acti...	01012018		12	180

- Jane Yellow was found as an exception due to questionable expected units. As a Full-Time Hourly employee, her expected units should be between 900 and 2600 hours.
- Instead, the contract record imported shows she is expected to work 12 months for 180 days.
- By clicking inside the Expected Units field, you can change the number of hours she is expected to work to show 2080 hours.

# After corrections, Validate file again

**Details**

Save Cancel

File Type Contract Import File L  
Import Description C003404 Jan 2018 Contract Update

Summary **Details**

Import Detail Status: All

Tools	Seq No	Import Message	Import Detail Status	Result Flag
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name
<a href="#">Actions</a>	2	Validated With Exceptions	<input checked="" type="checkbox"/>	YELLOW
<a href="#">Actions</a>	3	Validated Successful	<input checked="" type="checkbox"/>	PINK, JO
<a href="#">Actions</a>	4	Validated Successful	<input checked="" type="checkbox"/>	ORANGE
<a href="#">Actions</a>	5	Validated Successful	<input checked="" type="checkbox"/>	GREEN,

- Click the Validate button located on the left side of your screen about halfway down the page.

OR

- Close the Details page at the top left after corrections have been made. This will return you to the File History page when you can select the Actions button, and Validate from there.

# Validated Successfully

File History

Close

Report Type: All Date Range: 11/06/2017 To: 01/05/2018

Status: All

Fixing Error

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported
Actions	400655	Validated	01/04/2018	Contract Import	C003404 Jan ...	Validated Successfully	01/04/2018	01/05/2018	4 sec	8
Actions	400652	Completed	01/03/2018	Member Data	B003404 Jan ...	Processed with Exceptions	01/03/2018	01/05/2018	11 sec	0

- From the File History screen you can see that the Process Flag now shows the Contract Import file as Validated and the Status displays as “Validated Successfully” meaning that the exceptions and invalids were successfully corrected.

# Validated Successfully-Row Count

File History

Close

Report Type: All Date Range: 11/06/2017 To: 01/05/2018

Status: All

Tools	Load Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By	Comments
Actions	/2018	01/05/2018	4 sec	8	8	8	0	0			KRGOODLING	

- Scrolling to the right of your screen, the dark blue row represents our Contract Import line that was just Validated Successfully.
- The Contract Import has imported 8 rows, processed 8 rows, and now shows 8 Valid rows, with no Invalid or Exception Rows.

# Processing the Contract Import

- Scroll back to the left and click the Actions button at the start of the Contract Import row.
- Select Process.

**File History**

Close

Report Type: All Date Range: 11/06

Status: All

<u>Tools</u>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Descrip
<u>Actions</u>	400655	Validated	01/04/2018	Contract Import	C00340
	400652	Completed	01/03/2018	Member Dem...	D00340

- Validate
- Details
- Process
- Void
- Download

# File Processed Successfully

**File History**

Close

Report Type: All Date Range: 11/06/2017 To: 01/05/2018

Status: All

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Ro
<a href="#">Actions</a>	400655	Completed	01/04/2018	Contract Import	C003404 Jan ...	Processed Successfully	01/04/2018	01/05/2018	2 sec	8	
<a href="#">Actions</a>	400652	Completed	01/03/2018	Member Dem...	D003404 Jan ...	Processed with Exceptions	01/03/2018	01/05/2018	11 sec	8	

- Once processed, the Process Flag will show as Completed and the Status will show as Processed Successfully for the Contract Import File for January.
- Click the Close button at the top left of the screen to return to the Roster page.

# Roster Tab: Searching and Sorting your Roster

Your guide to finding current and past employees that have worked for your school.

# Search Box feature

- To search for an employee, enter the first and/or last name, or social security number in the Search box.
- Member John Pink was newly added to the roster. Entering “Pink, John” in the search box will bring up any employees with this name.
- To search with a full name, the last name must be entered first, followed by a comma, then the first name.

Home Profile Account **Roster** Documents Contacts

Roster

Billing Location: 3404 SMOKEY PINES SD

Search: Pink, John

Contract Status: All

<a href="#">Tools</a>	SSN	Member	Start Date	Stop Date	Work Status
<a href="#">Actions</a>	435-01-0002	PINK, JOHN	01/01/2018		ACTIVE - Actively Working

# Searching a Partial Name

Billing Location: 3404 SMOKEY PINES SD

Search: Blue

Contract Status: All

<a href="#">Tools</a>	SSN	Member	Start Date	Stop Date	Work Status
<a href="#">Actions</a>	199-34-3268	BLUE WILLIAMS, SAMA...	11/09/2017		ACTMLC - Activated Militar...
<a href="#">Actions</a>	199-34-3268	BLUE WILLIAMS, SAMA...	10/01/2017	11/08/2017	ACTIVE - Actively Working
<a href="#">Actions</a>	215-42-5142	BLUE, BILL BOB	10/01/2017		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0007	BLUE, DEB	01/01/2018		ACTIVE - Actively Working
<a href="#">Actions</a>	178-52-2220	BLUE, WANDA	09/01/2017		ACTIVE - Actively Working

- If only “Blue” is entered in the Search Box, any employee with BLUE within their name will be found in the search.
- This search found four members.

# Members with Multiple Contracts

- Any contracts from your school associated with the employee you are searching for will be found in your search.
- **Open contract records will not have a stop date.** When a new contract is created, the previous open contract should close without a gap in dates.

Billing Location:	3404 SMOKEY PINES SD				
Search:	Onderdonk <input type="button" value="x"/>				
Contract Status:	All <input type="button" value="v"/>				
<a href="#">Tools</a>	SSN	Member	Start Date	Stop Date	Work Status
<a href="#">Actions</a>	161-40-4589	ONDERDONK, KIMBERL...	10/01/2017		WKCMFN - Worker's Com...
<a href="#">Actions</a>	161-40-4589	ONDERDONK, KIMBERL...	04/01/2018	04/01/2018	ACTIVE - Actively Working
<a href="#">Actions</a>	161-40-4589	ONDERDONK, KIMBERL...	09/01/2017	09/30/2017	ACTIVE - Actively Working

# Partial SSN search

- Searches can be done for partial information also. For example, “435” will find any members whose SSN begin with those three digits.

Billing Location:	3404 SMOKEY PINES SD
Search:	435 <input type="button" value="x"/>
Contract Status:	All <input type="button" value="v"/>

<a href="#">Tools</a>	SSN	Member	Start Date	Stop Date	Work Status
<a href="#">Actions</a>	435-01-0008	BLACK, LINDA	01/01/2018		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0007	BLUE, DEB	01/01/2018		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0004	GREEN, CURTIS	01/01/2018		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0003	ORANGE, SALLY	01/01/2018		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0002	PINK, JOHN	01/01/2018		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0005	PURPLE, FRANK	01/01/2018		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0006	RED, BARBARA	01/01/2018		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0001	YELLOW, JANE	01/01/2018		ACTIVE - Actively Working

# Tools Button on Roster Tab

Billing Location: 3404 SMOKEY PINES SD

Search: 435

Contract Status: All

Tools	SSN	Member
Export		PDF
Modify		XLS
View		CSV
Revert Settings	03	ORANGE, SALLY
Advanced Sort	02	PINK, JOHN

- Using the Tools button on your Roster tab you can **Export** your Roster. When the **blue arrow** is clicked, you can select a PDF, XLS or SCV file containing your roster details.
- **Modify** does not have employer functionality currently.
- **View** allows you to see roster contract information in a different format.
- At the right of each column header is a pull down arrow giving options for how the roster can be sorted. **Revert Settings** will bring this screen back to the standard format.
- **Advanced Sort** gives you the option to reorganize the order of your columns.

# View Row Tool

- When View is selected, the View Row Tool will appear. This starts with the person at the top of your roster and allows you to use the left/right arrows to read through member contracts.
- The Roster will highlight the record being viewed in blue behind the View Row Tool screen. Example: Curtis Green
- The OK or Cancel buttons at the bottom of that screen will close this function.

The screenshot shows two overlapping windows. The 'Roster' window on the left contains search filters: 'Billing Location: 3404 SMOKEY PINES SD', 'Search: 435', and 'Contract Status: All'. Below these is a table with columns 'Tools', 'SSN', and 'Member'. The row for 'GREEN, CURTIS' (SSN 435-01-0004) is highlighted in blue. The 'View Row Tool' window on the right displays a table with columns 'Name' and 'Value', showing details for the selected member: SSN 435-01-0004, Member GREEN, CURTIS, Start Date 01/01/2018, Stop Date, and Work Status ACTIVE - Actively Working. Navigation arrows are at the top of the tool, and OK/Cancel buttons are at the bottom.

Tools	SSN	Member
<a href="#">Actions</a>	435-01-0008	BLACK, LINDA
<a href="#">Actions</a>	435-01-0007	BLUE, DEB
<a href="#">Actions</a>	435-01-0004	GREEN, CURTIS
<a href="#">Actions</a>	435-01-0003	ORANGE, SALLY
<a href="#">Actions</a>	435-01-0002	PINK, JOHN
<a href="#">Actions</a>	435-01-0005	PURPLE, FRANK
<a href="#">Actions</a>	435-01-0006	RED, BARBARA
<a href="#">Actions</a>	435-01-0001	YELLOW, JANE

Name	Value
SSN	435-01-0004
Member	GREEN, CURTIS
Start Date	01/01/2018
Stop Date	
Work Status	ACTIVE - Actively Working

# Column sorting

<a href="#">Tools</a>	SSN	Member	▼ Start Date	Stop Date	Work Status
<a href="#">Actions</a>	435-01-0008	BLACK, LINDA	 Sort Ascending		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0007	BLUE, DEB	 Sort Descending		ACTIVE - Actively Working
<a href="#">Actions</a>	435-01-0004	GREEN, CURTIS	 Columns		Actively Working
<a href="#">Actions</a>	435-01-0003	ORANGE, SALLY	01/01/2018		Actively Working
<a href="#">Actions</a>	435-01-0002	PINK, JOHN	01/01/2018		Actively Working
<a href="#">Actions</a>	435-01-0005	PURPLE, FRANK	01/01/2018		Actively Working
<a href="#">Actions</a>	435-01-0006	RED, BARBARA	01/01/2018		Actively Working
<a href="#">Actions</a>	435-01-0001	YELLOW, JANE	01/01/2018		ACTIVE - Actively Working

- Each column can be sorted Alphabetically Ascending or Descending and columns can be turned on or off per preference using the checkboxes.
- Example-Member Column. The down arrow shows your options for sorting.
- If you sort and realize you would like to go back to the standard format, Revert Settings is available using the Tools button at the left of the column headers.

# Roster Tab: Manually updating Contract Records and Demographic Information

The **Actions** button provides options for updating member records manually.

# Roster Actions button

<a href="#">Tools</a>	SSN	Member	Start Date	Stop Date	Work S
<a href="#">Actions</a>	435-01-0008	BLACK, LINDA	01/01/2018		ACTIV
<a href="#">Actions</a>	435-01-0007	BLUE, DEB	01/01/2018		ACTIV
<a href="#">Actions</a>	435-01-0004	GREEN, CURTIS	01/01/2018		ACTIV
		GE, SALLY	01/01/2018		ACTIV
		JOHN	01/01/2018		ACTIV
		E, FRANK	01/01/2018		ACTIV
<a href="#">Actions</a>	435-01-0006	RED, BARBARA	01/01/2018		ACTIV

- Add Member Contract
- View/Edit Contract Record
- View/Edit Demographic Info

- Roster Actions include:
  - Adding a member contract manually for an existing employee
  - View/Edit Contract Record
  - View/Edit Demographic Info

# View/Edit Member Contract

- You may want to view a member's contract to be sure of wage type and expected units before creating a new member contract.
- The Change button in the top left will allow you to make edits to the current contract record. When completed, click the OK button in the bottom right corner.

### Member Contract

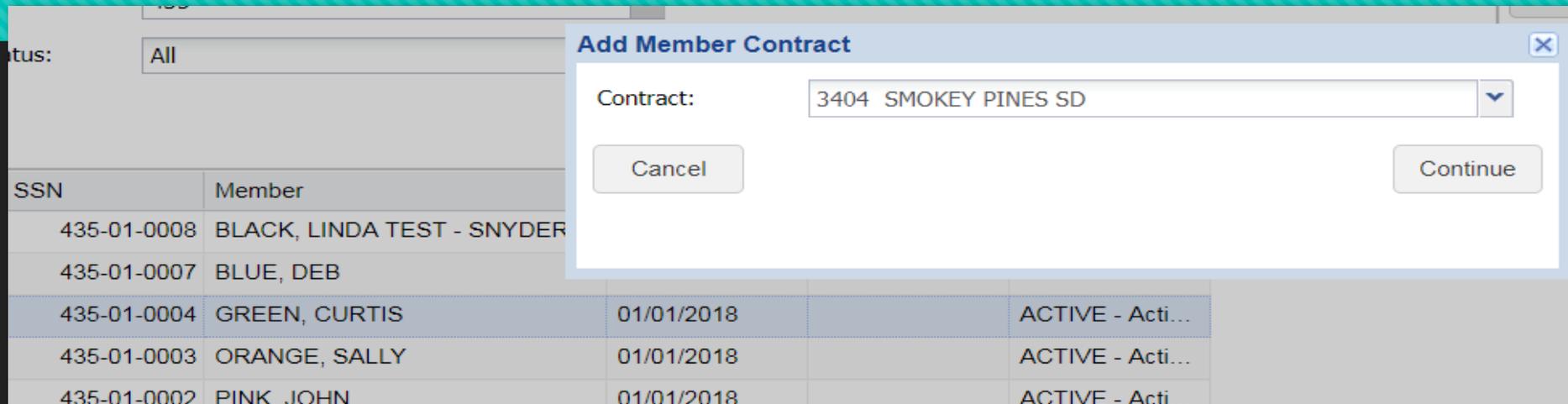
[Change](#)

Employer: 3404-SMOKEY PINES SD      Billing Entity: 3404 SMOKEY PINES SD  
SSN: 435-01-0004  
Name: GREEN, CURTIS

Member Contract

Job Title:	TEACHER	Employment Type:	Part-Time
Wage Type:	Hourly	Work Status:	ACTIVE - Actively Worki
Start Date:	01/01/2018	End Date:	mm/dd/yyyy
Expected Months:	10	Expected Units:	1,100
Voting Status:	Non-Certified	Contract Status:	Eligible
BOC Flag:		Service Flag:	
BOC Svc Rpt:	mm/dd/yyyy		

# Add new Member Contract



The screenshot shows a software interface with a table of members and an 'Add Member Contract' dialog box. The dialog box is open, showing a dropdown menu for 'Contract' with the value '3404 SMOKEY PINES SD'. The 'Continue' button is highlighted. The table below has columns for SSN, Member, and other details. The row for 'GREEN, CURTIS' is highlighted, and a red arrow points to it.

SSN	Member			
435-01-0008	BLACK, LINDA TEST - SNYDER			
435-01-0007	BLUE, DEB			
435-01-0004	GREEN, CURTIS	01/01/2018		ACTIVE - Acti...
435-01-0003	ORANGE, SALLY	01/01/2018		ACTIVE - Acti...
435-01-0002	PINK, JOHN	01/01/2018		ACTIVE - Acti...

- The Add Member Contract function will allow you to create new contracts manually for your members.
- When you click the Add Member Contract option, a dialogue box will appear populating your school name. Click Continue.
- In the background, you will see that the transaction row for Green, Curtis is highlighted as the member you are generating a new contract for.

# View/Edit Contract Record

- The member contract screen populates the name of the school and the member's name and SSN in the blue banner.
- Using the tab button will allow you to move from field to field or you may use your mouse to navigate.
- You will not need to enter an end date when creating a new record.
- Contract status will be Eligible for most contracts.
- A Termination record is the only contract that requires BOC Flag, Service Flag and BOC Service Report date.
- Click Save when completed.

**Member Contract**

Employer: 3404-SMOKEY PINES SD      Billing Entity: 3404 SMOKEY PINES SD  
SSN: 435-01-0004  
Name: GREEN, CURTIS

Member Contract

Job Title:	<input type="text" value="CUSTODIAN"/>	Employment Type:	<input type="text" value="Full-Time"/>
Wage Type:	<input type="text" value="Hourly"/>	Work Status:	<input type="text" value="ACTIVE - Actively Worki"/>
Start Date:	<input type="text" value="02/04/2018"/>	End Date:	<input type="text" value="mm/dd/yyyy"/>
Expected Months:	<input type="text" value="12"/>	Expected Units:	<input type="text" value="2,080"/>
Voting Status:	<input type="text" value="Non-Certified"/>	Contract Status:	<input type="text" value="Eligible"/>
BOC Flag:	<input type="text"/>	Service Flag:	<input type="text"/>
BOC Svc Rpt:	<input type="text" value="mm/dd/yyyy"/>		

# New Contract Confirmation

## Member Contract

### Confirm Changes to My Information

I agree and acknowledge that by clicking Confirm, I am electronically signing this document, with the same legal force and effect as a hand-written signature. I understand and acknowledge the inherent risks associated with electronic transactions and communications, and I consent to conduct this transaction by electronic means. I hereby represent that I have the legal authority to enter into this transaction. I hereby represent that I am the authorized user in question, and agree and acknowledge that I will be deemed to have read, understood and accepted the disclaimers that are part of this site. I agree and acknowledge that this transaction is not effective unless and until PSERS has confirmed it through a pop-up message or a document on the Documents page, and that if I do not receive such confirmation within 24 hours of clicking Confirm, I should contact PSERS to inquire about the status of the transaction. It is my responsibility to retain a copy of such confirmation.

Employer: 3404-SMOKEY PINES SD      Billing Entity: 3404 SMOKEY PINES SD  
SSN: 435-01-0004  
Name: GREEN, CURTIS

### Member Contract

Job Title:	CUSTODIAN	Employment Type:	Full-Time
Wage Type:	Hourly	Work Status:	ACTIVE - Actively Worki
Start Date:	02/04/2018	End Date:	mm/dd/yyyy
Expected Months:	12	Expected Units:	2,080
Voting Status:	Non-Certified	Contract Status:	Eligible
BOC Flag:		Service Flag:	
BOC Svc Rpt:	mm/dd/yyyy		

- Review new contract information entered. If all details appear correctly, click the Confirm button at the bottom right.
- If there is a detail you would like to change, click the Back button at the bottom of the page.
- Or, if you realize this contract was created in error you may click Cancel in the bottom left to cancel the new contract.

# Contract Check

<a href="#">Actions</a>	435-01-0004	GREEN, CURTIS	02/04/2018		ACTIVE - Acti...
<a href="#">Actions</a>	435-01-0004	GREEN, CURTIS	01/01/2018	02/03/2018	ACTIVE - Acti...
<a href="#">Actions</a>	435-01-0003	ORANGE, SALLY	01/01/2018		ACTIVE - Acti...
<a href="#">Actions</a>	435-01-0002	PINK, JOHN	01/01/2018		ACTIVE - Acti...

- After clicking Confirm, a new row will appear for that member in your roster tab.
- The previous contract will also be end dated. In our example, Green's new contract started 2/4/2018 so the hourly teacher contract is end dated as of 2/3/2018.

# View/Edit Demographic Info



A screenshot of a software interface showing a table with a dropdown menu. The table has three columns: 'Actions', 'Contract ID', and 'Member Name'. The first row is highlighted in light blue. A dropdown menu is open over the first row, listing three options: 'Add Member Contract', 'View/Edit Contract Record', and 'View/Edit Demographic Info'. A red arrow points to the 'View/Edit Demographic Info' option.

Actions	Contract ID	Member Name
<u>Actions</u>	435-01-0004	GREEN, CURTIS
Add Member Contract		, CURTIS
View/Edit Contract Record		E, SALLY
View/Edit Demographic Info		OHN

- Back to the Actions button, Click View/Edit Demographic Info to make a change to a member's demographic information.

# Updating Member Demographic Info

[Back](#) Name: GREEN, CURTIS      DOB: 08/14/1985      SSN: 435-01-0004

[Member Info](#)

[Change](#)

**Demographics**

Prefix:		SSN:	435-01-0004
First Name:	CURTIS	PSERS ID:	9115986
Middle Name:		Date of Birth:	08/14/1985
Last Name:	GREEN	Gender:	Male
Suffix:		Employer-Provided Email:	
Residence:	63 BLUEBIRD CIR HARRISBURG PA 17101	Day Phone:	717560123      Ext:

- If you only want to view the member's demographic information and not make changes, review, then use the Back button in the top left corner to return to the Roster tab.
- If changes are needed to update information, click the Change button above the word Demographics.
- **Remember, SSN and DOB changes must be made by PSERS.** If this information is incorrect, please submit a **Demographic Information Change Request Form** from the form list on your Dashboard.

# Member Info Screen

### Member Info

#### Demographics

Prefix:	<input type="text"/>	SSN:	<input type="text" value="435-01-0004"/>
First Name:	<input type="text" value="CURTIS"/>	PSERS ID:	<input type="text" value="9115986"/>
Middle Name:	<input type="text"/>	Date of Birth:	<input type="text" value="08/14/1985"/>
Last Name:	<input type="text" value="GREEN"/>	Gender:	<input type="text" value="Male"/>
Suffix:	<input type="text"/>	Employer-Provided Email:	<input type="text"/>
Residence:	<input type="text" value="63 BLUEBIRD CIR&lt;br/&gt;HARRISBURG PA 17101"/>	Day Phone:	<input type="text" value="717560123"/> Ext: <input type="text"/>
		Evening Phone:	<input type="text"/> Ext: <input type="text"/>
		Other Phone:	<input type="text"/> Ext: <input type="text"/>
		Member-Provided Email:	<input type="text"/>
		Fax:	<input type="text"/>

- Email is a great way to contact people. Please enter an Employer-Provided Email address for your employees if they have a school email address.
- To update the member's address, click the pencil beside the Residence Address field. Click the Edit Address option. OR, click inside the address box.

# Updating an address

- The last change made to the address will appear at the top of the address box.
- When the zip code is entered, the correct city and state will populate.
- The Effective Date of the address change will populate with the current date.
- Click OK when your changes are completed.

Employee-Provided Email

### Edit Residence Address

OK Cancel Copy▼

Inserted By: KRGOODLING on 01/05/2018

Country: UNITED STATES OF AM ▼

Zip: 17101

Street: 312 Green St

Apt./Suite#:

Care Of:

City: HARRISBURG

State: Pennsylvania ▼

County: DAUPHIN ▼

Effective Date: 02/10/2018

# Completing demographic changes

**Member Info**

**Demographics**

Prefix:	<input type="text"/>	SSN:	<input type="text" value="435-01-0004"/>
First Name:	<input type="text" value="CURTIS"/>	PSERS ID:	<input type="text" value="9115986"/>
Middle Name:	<input type="text"/>	Date of Birth:	<input type="text" value="08/14/1985"/>
Last Name:	<input type="text" value="GREEN"/>	Gender:	<input type="text" value="Male"/>
Suffix:	<input type="text"/>	Employer-Provided Email:	<input type="text" value="cgreen@example.com"/>
Residence:	<input type="text" value="312 GREEN ST&lt;br/&gt;HARRISBURG PA 17101"/>	Day Phone:	<input type="text" value="717560123"/> Ext: <input type="text"/>
		Evening Phone:	<input type="text"/> Ext: <input type="text"/>
		Other Phone:	<input type="text"/> Ext: <input type="text"/>
		Member-Provided Email:	<input type="text"/>
		Fax:	<input type="text"/>

- The member's address and employer-provided email have been updated. Click Next in the bottom left to continue.

# Confirmation Screen

**Member Info**

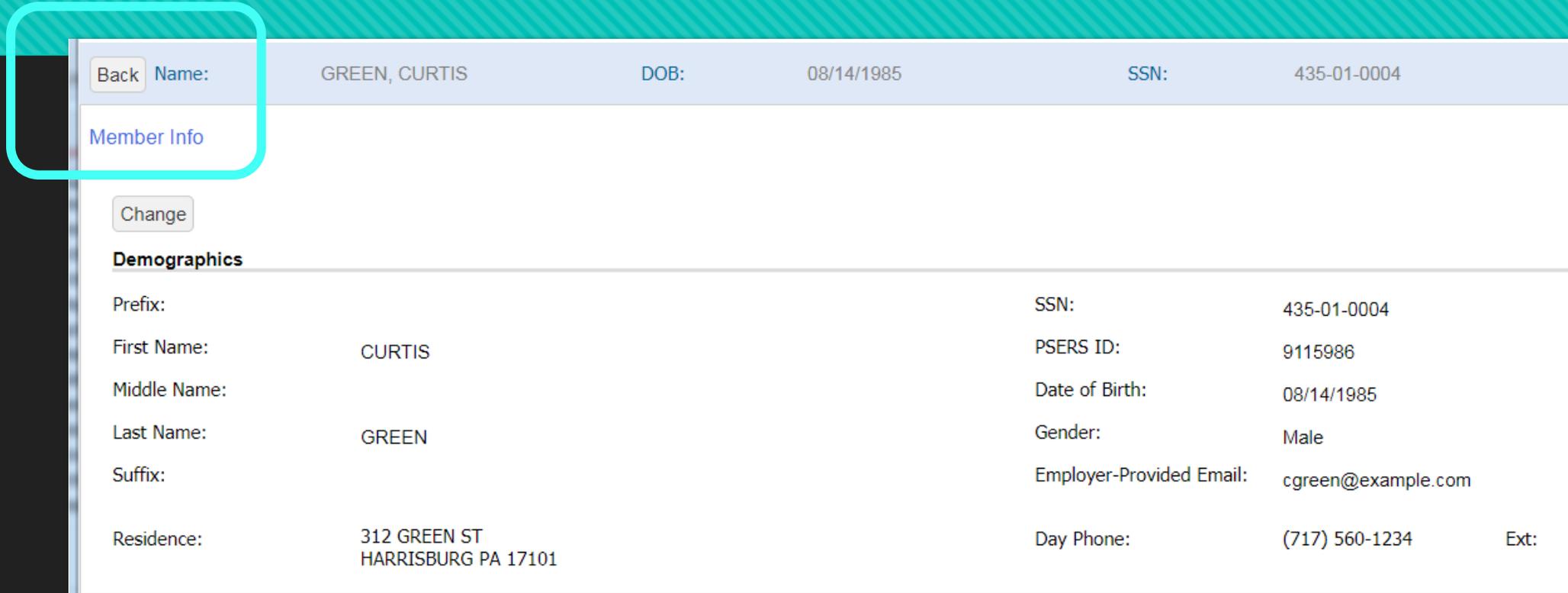
**Confirm Changes to My Information**  
I agree and acknowledge that by clicking Confirm, I am electronically signing this document, with the same legal force and effect as a hand-written signature. I understand and acknowledge the inherent risks associated with electronic transactions and communications, and I consent to conduct this transaction by electronic means. I hereby represent that I have the legal authority to enter into this transaction. I hereby represent that I am the authorized user in question, and agree and acknowledge that I will be deemed to have read, understood and accepted the disclaimers that are part of this site. I agree and acknowledge that this transaction is not effective unless and until PSERS has confirmed it through a pop-up message or a document on the Documents page, and that if I do not receive such confirmation within 24 hours of clicking Confirm, I should contact PSERS to inquire about the status of the transaction. It is my responsibility to retain a copy of such confirmation.

**Demographics**

Prefix:		SSN:	435-01-0004	
First Name:	CURTIS	PSERS ID:	9115986	
Middle Name:		Date of Birth:	08/14/1985	
Last Name:	GREEN	Gender:	Male	
Suffix:		Employer-Provided Email:	cgreen@example.com	
Residence:	<input type="text" value="312 GREEN ST&lt;br/&gt;HARRISBURG PA 17101"/>	Day Phone:	<input type="text" value="(717) 560-1234"/>	Ext: <input type="text"/>

- ESS will ask you to confirm your changes one final time. If you agree, Click Confirm in the bottom right.
- Click Back if you need to make a correction.
- Click Cancel in the bottom left if you wish to cancel the demographic change entirely.

# Member Info



The screenshot shows a web interface for member information. At the top, there is a header bar with a 'Back' button and a 'Member Info' link, both highlighted with a red rounded rectangle. Below this, a 'Change' button is visible. The main content area is titled 'Demographics' and contains a table of member details.

Back	Name:	GREEN, CURTIS	DOB:	08/14/1985	SSN:	435-01-0004
<a href="#">Member Info</a>						
Change						
<b>Demographics</b>						
Prefix:			SSN:		435-01-0004	
First Name:	CURTIS		PSERS ID:		9115986	
Middle Name:			Date of Birth:		08/14/1985	
Last Name:	GREEN		Gender:		Male	
Suffix:			Employer-Provided Email:		cgreen@example.com	
Residence:	312 GREEN ST HARRISBURG PA 17101		Day Phone:		(717) 560-1234	Ext:

- After confirming your member demographic info update, you will be returned to the Member Info screen. Click the Back button in the top left to return to the Roster tab page.

# Account Tab

Your Account Tab is the work area for **Work History Reporting** and **Work History Adjustment** related information for your employees.

# Account Tab Screen

Home Profile **Account** Roster Documents Contacts Admin

Account

Billing Location: 3404 SMOKEY PINES SD

Trans Type: All

Status: Open

Report Status: All

Upload File File History

Manual Report

<a href="#">Tools</a>	Posting Date	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Emp S
<a href="#">Actions</a>	12/13/2017	12/01/2017	1968298	WH Report	Billing Rpt 12/31/2017	Open	Initial	01/10/2018	
<a href="#">Actions</a>	11/14/2017	11/01/2017	1966389	WH Report	Brow 5897 test	Open	Initial	12/10/2017	

- Your Account tab will display transactions made to a school's account. This includes billings reports (work history reports), adjustments made by both the school and PSERS, and payments made to the school's account.

# Filtering the Account Tab by Trans Type

- The Account tab can be filtered using a long list of descriptors. A sample of this list is pictured to the right. Use the scroll bar on the right side of the search box to view the remaining options on the list.
- Employers may commonly filter by:
  - All Work Reports
  - Payment
  - WH Adjustment
  - WH Report
- The additional items listed are filters that may be used for PSERS staff to research different types of accounting issues.
- Employers will see adjustments made by the district and PSERS staff in their Account tab.

The screenshot shows a software interface with a search box for 'Trans Type' and a dropdown menu. The search box contains '3404 SMOKEY PINES SD'. The dropdown menu is open, showing a list of accounting descriptors. The 'All' option is selected in the dropdown. Below the search box, there is a table with columns for 'Tools', 'Posting Date', and 'Trans Type'. The table contains three rows of data.

Tools	Posting Date	Trans Type
Actions	12/13/2017	Interest Waiver
Actions	11/14/2017	Misc. Item

The dropdown menu options are: All, All Work Reports, Balance Adj., Contribution, Disbursement, Dishonored Check, Interest, Interest Waiver, Misc. Item, Negative WH Adj, Notification, Payment, POS Employer Contribution, POS Employer Contribution Interest, and PT Non-Qual.

# Filter by Status

- The default value will show “Open” on your Account Tab in the Status Menu.
- You are able to filter by Open, Closed, or Hold transactions.
- An example of a Hold Transaction is an adjustment using the Court Award identifier.

Billing Location: 3404 SMOKEY PINES SD

Trans Type: All

Status: Open

Report Status: All, Closed, Disputed, Hold, Open

<a href="#">Tools</a>	Posting Da				
<a href="#">Actions</a>	12/13/2017	12/01/2017	1968298	WH Rep	

# Filtering by Report Status

Billing Location: 3404 SMOKEY PINES SD

Trans Type: All

Status: Open

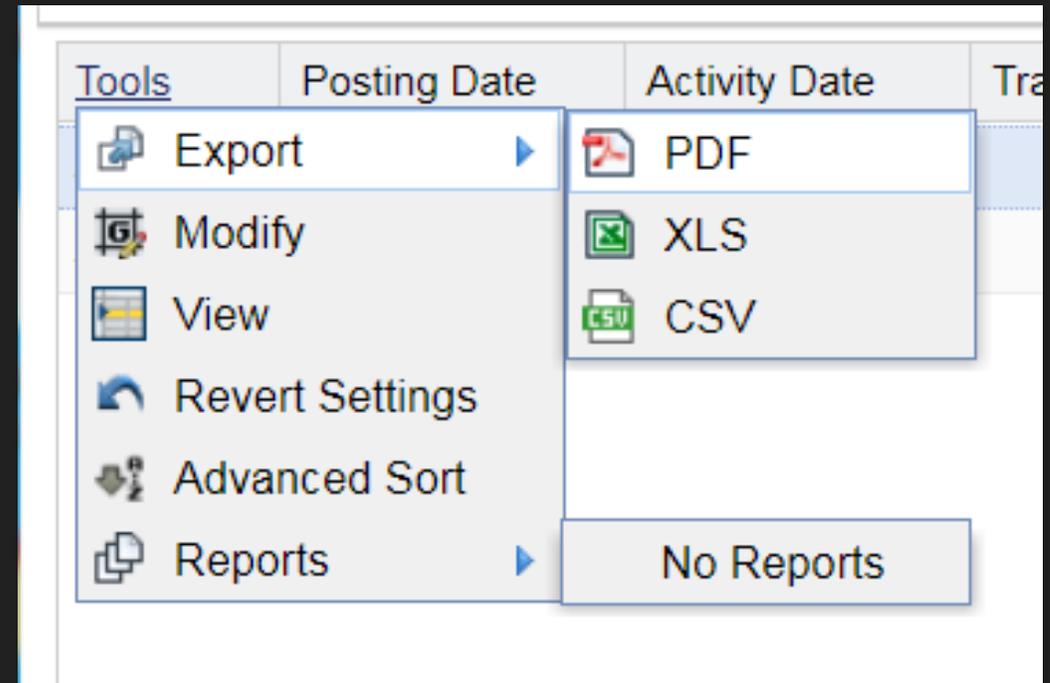
Report Status: All

Tools	Posting Date	Report Status
<a href="#">Actions</a>	12/13/2017	Hold
<a href="#">Actions</a>	11/14/2017	Initial

- Report Status is defaulted to All. The Report Status could assist in filtering to find which reports are still in an initial status rather than released.

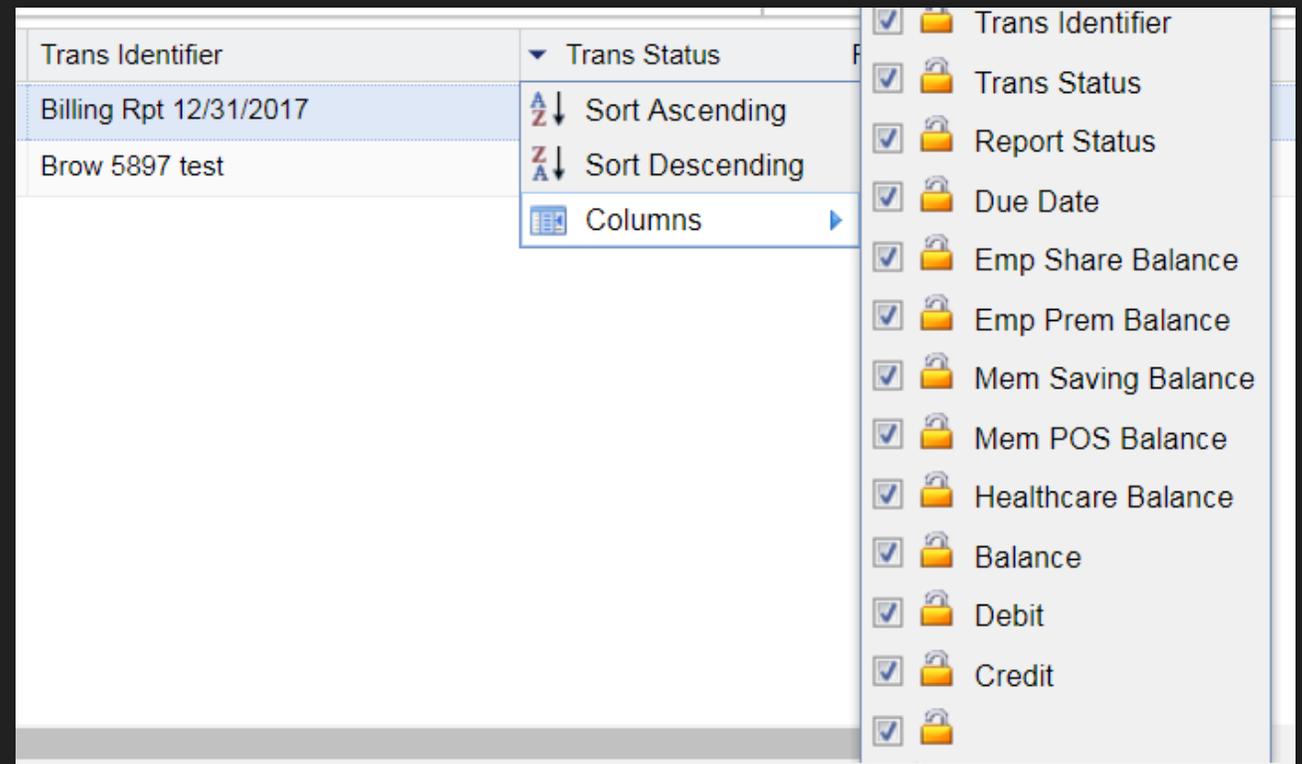
# Sorting using the Tools button

- Similar to the Tools button on the Roster tab, the Account tab details can be Exported also.
- New to the Tools button is a Reports button at the bottom; however, there are no reports available. The blue arrow leads to “No Reports” when selected.



# Sorting Account Tab Columns

- The columns may also be sorted to your preference using the Sort Ascending/Descending options.
- Columns may be shrunk closer together to condense what is visible on your screen or they can be stretched out to read full identifiers. To do this, hover to the right of the arrow for the column you would like to move until you get the icon with expansion arrows.



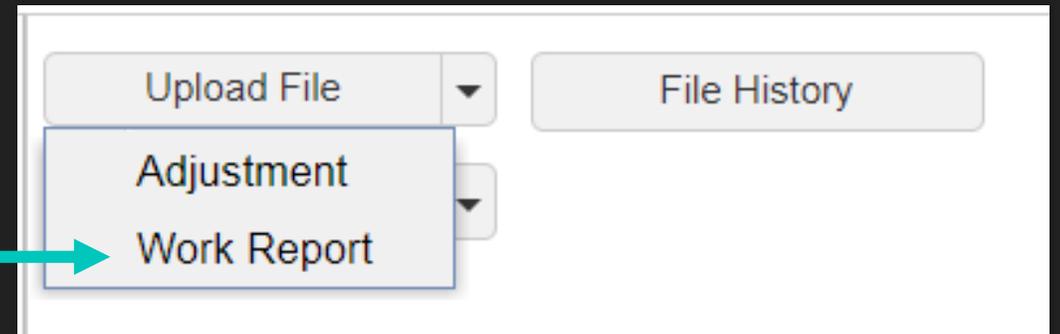
# Account Tab-Available Actions



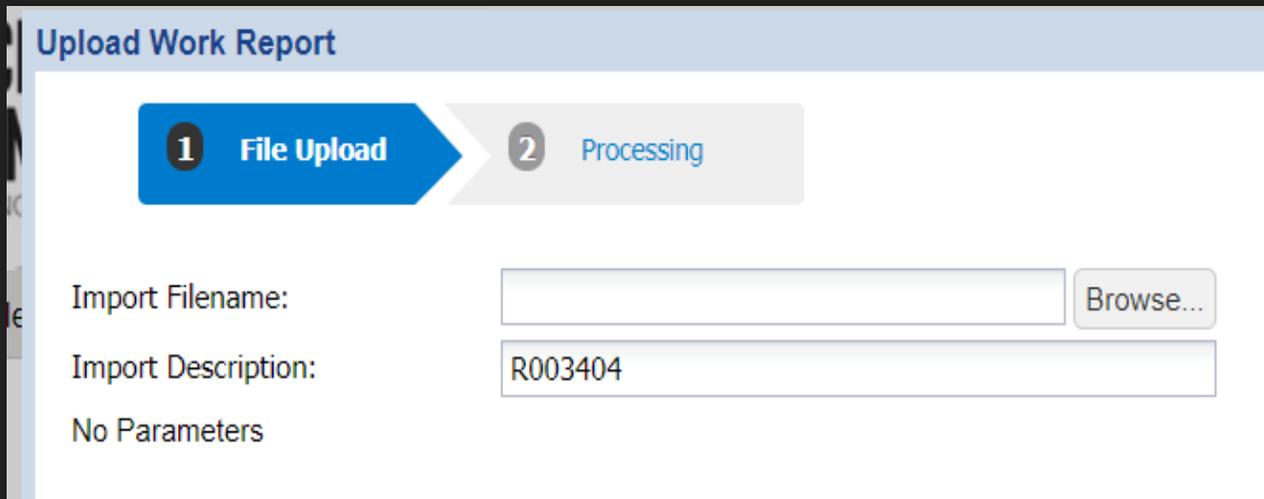
- Upload File button arrow offers Adjustment or Work Report options. This button will walk you through the steps to import these types of files.
- The File History button will serve as your work area and approved reports area all in one. Once your file has been imported into the system you will be able to see the status of your file and the number of rows imported. This screen will also show the number of invalid or exception rows to be corrected.
- The Manual Report button arrow offers manual work report or adjustment options

# Importing a Work History Report

- A reminder: There are **NO CHANGES** to the format of the Work Report in ESS.
- Click the Upload File button. Select Work Report.



# Importing a Work History Report File

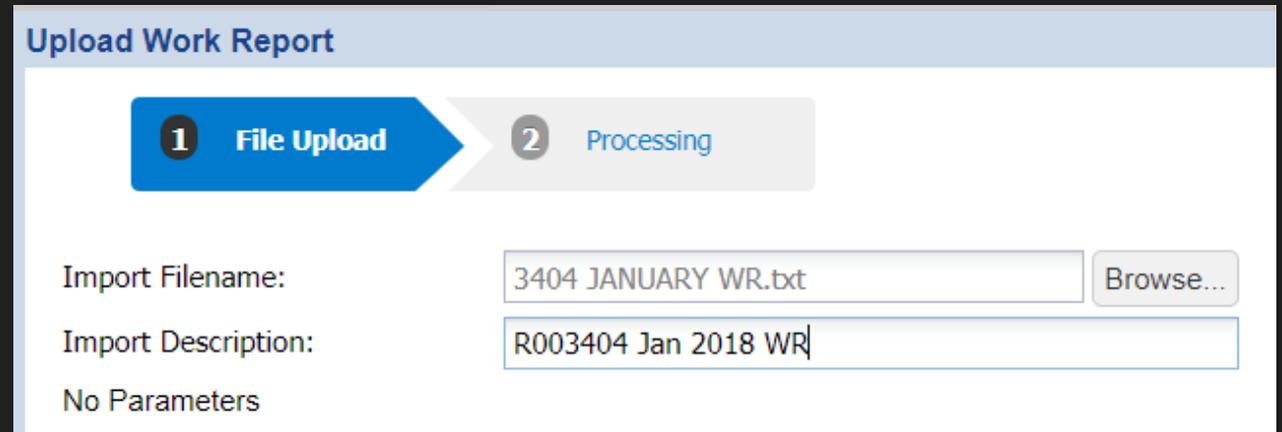


The screenshot shows a web interface titled "Upload Work Report". At the top, there is a progress bar with two steps: "1 File Upload" (highlighted in blue) and "2 Processing" (greyed out). Below the progress bar, there are three input fields: "Import Filename:" with an empty text box and a "Browse..." button; "Import Description:" with a text box containing "R003404"; and "No Parameters" with an empty text box.

- You will browse your computer files to locate the file you would like to import.
- The Import Description will auto-populate by showing "R003404" which represents a Work Report file for reporting unit code 3404.
- You can change this identifier to be more specific to include the month, year, or reason for uploading this file.
- When you successfully locate your file, click Next at the bottom right of your screen to move into the Processing phase.

# Selecting Your File

- File selected will show in gray.
- Import Description updated to my preference.
- Click the Next button in the bottom right corner. To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- A message stating “Processing file....Please wait” will display on your screen while processing.



The screenshot displays the 'Upload Work Report' interface. At the top, there is a progress bar with two steps: '1 File Upload' (highlighted in blue) and '2 Processing' (grayed out). Below the progress bar, there are three input fields: 'Import Filename' with the value '3404 JANUARY WR.txt' and a 'Browse...' button; 'Import Description' with the value 'R003404 Jan 2018 WR'; and 'No Parameters'.

# Select File

**Upload Work Report**

**1 File Upload** → **2 Processing**

Import Filename:

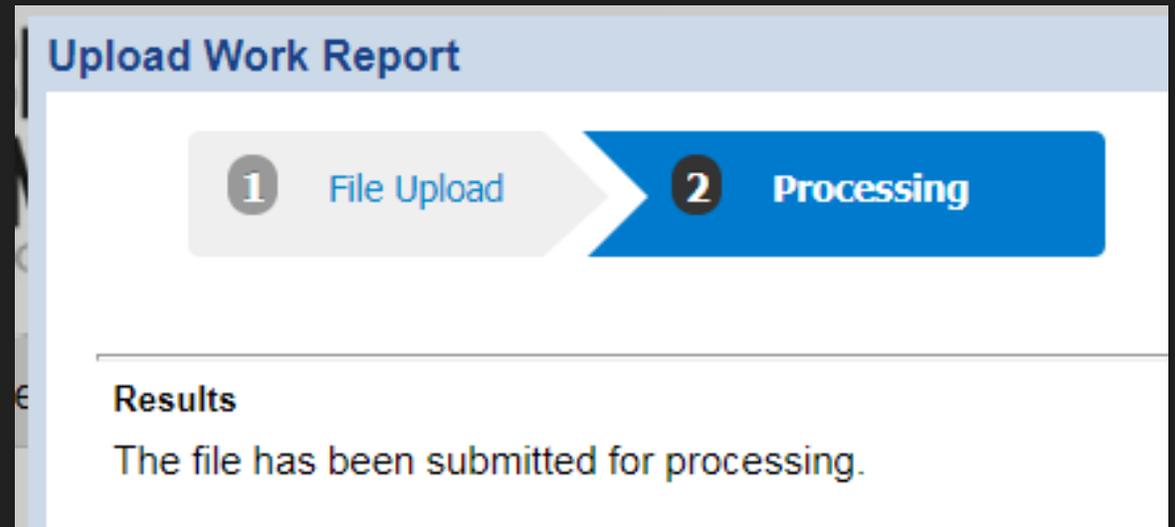
Import Description:

No Parameters

- File selected will show in gray.
- Import Description updated to the previously entered description.
- Click the Next button in the bottom right corner. To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- A message stating “Processing file....Please wait” will display on your screen while processing.

# Processing the Work Report File

- After the “Processing file...please wait” message, the screen will show your file results.
- You can view the details of your file using the Details button in the bottom right corner.



**Upload Work Report**

1 File Upload

2 Processing

---

**Results**

The file has been submitted for processing.

# File History

**File History**

Close

Report Type: All Date Range: 11/09/2017 To: 01/08/2018

Status: All

<a href="#">Tools</a>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported
<a href="#">Actions</a>	400657	Ready	01/05/2018	Work Report	R003404 Jan ...	Validated with Errors	01/05/2018			8

- If you select the Close button, ESS will direct you to the File History page.
- The Jan 2018 WR has been imported into the system, but has not yet been Validated. The Process Flag still reads as “Ready” while the file Status is displaying “Validated with Errors” and 8 rows of data have been imported.
- **TIP:** You do not need to continue processing a file all at once. Once imported, you may come back to Validate, Correct, or Process the file. You can find any files imported using the File History button.

# Validating the file

- Click the Actions button at the beginning of your Work Report Row.
- Select the Validate option.

<u>Tools</u>	Import Header Id	Process Flag	Inserted Date	Report Type
<u>Actions</u>	400657	Ready	01/05/2018	Work Report
<u>Actions</u>	400522	Completed	11/14/2017	Work Report
<u>Actions</u>	400520	Completed	11/14/2017	Work Report
<u>Actions</u>	400519	Completed	11/14/2017	Work Report
<u>Actions</u>	400518	Completed	11/14/2017	Work Report
<u>Actions</u>	400517	Completed	11/14/2017	Work Report

- Validate
- Details
- Process
- Void
- Download

# Validating the file

<a href="#">Tools</a>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported
<a href="#">Actions</a>	400657	Validated	01/05/2018	Work Report	R003404 Jan ...	Validated with Errors	01/05/2018	01/08/2018	5 sec	8

- As the validation occurs, the Process Flag will read “Queued Validation”.
- After the file is Validated, the status will update and the duration will populate.

# Row Details of Work History Report File

<a href="#">Tools</a>	Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By
<a href="#">Actions</a>	18	01/08/2018	5 sec	8	6	6	2	0			KRGOODLING

- If you continue to scroll to the right, the imported row details of your file will be visible. There are 8 imported rows, but only 6 rows are Valid. There are two (2) Invalid Rows that will need to be corrected prior to processing the work history report file.
- Using the Actions button at the start of the row, select Details.

# View Details of Work History Report File

- Click Details to view the transaction rows and to use the exception filter to correct errors for the Work History Report file.

<u>Tools</u>	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start
<u>Actions</u>	Validated	01/05/2018	Work Report	R003404 Jan ...	Validated with Errors	01/05/2018
Validate		11/14/2017	Work Report	October Blank...	Voided	11/14/2017
Details		11/14/2017	Work Report	October Blank...	Processed Successfully	11/14/2017
Process		11/14/2017	Work Report	September Bl...	Processed Successfully	11/14/2017
Void		11/14/2017	Work Report	August Blank	Processed Successfully	11/14/2017
Download		11/14/2017	Work Report	August Blank ...	Voided	11/14/2017

# Locating the Exception Filter

**Details**

Save Cancel

File Type Work Report File Load Date 01/05/2018  
Import Description R003404 Jan 2018 WR

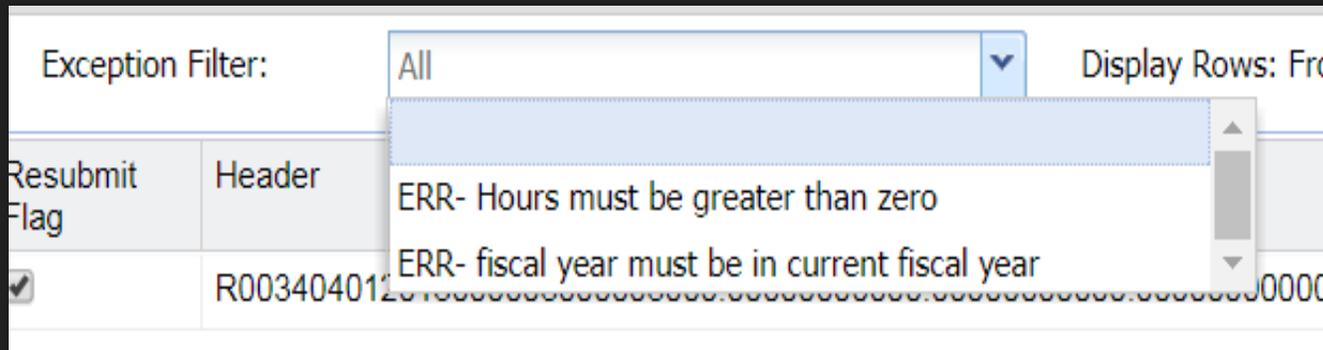
Summary **Details**

Import Detail Status: All Exception Filter: All

<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>	R003404012018000008000008000.000000000000.00000000

- Clicking Details takes you to the Details screen and puts you into Edit mode, enabling you to make changes to your file.
- From the File History screen, you know there are two rows that are invalid. Using the Exception Filter at the top center of the screen, use the pull down area to view these errors. **You must be in edit mode to use the Exception Filter.**

# Errors found on Work History Report File



Exception Filter: All Display Rows: From

Resubmit Flag	Header
<input checked="" type="checkbox"/>	R003404012

ERR- Hours must be greater than zero  
ERR- fiscal year must be in current fiscal year

- Two errors (ERR) were found through validating the work history report. These errors have caused the two invalid rows that were visible on the file history tab.
- Select the error you would like to correct.

# Error-Hours must be greater than zero

- Click the error you would like to fix first. This will bring all members with that error into the middle of the screen.
- ERR-Hours must be greater than zero was the error selected. One member, Curtis Green is displaying this error.

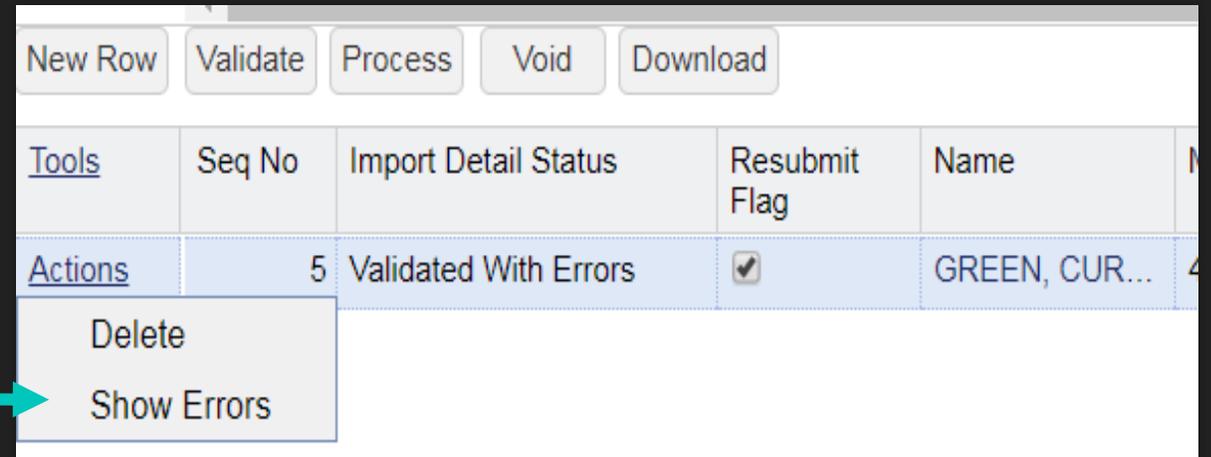
Import Detail Status: All		Exception Filter: ERR- Hours must be greater than zero			
Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated Successful	<input checked="" type="checkbox"/>	R003404012018000008000008000.00000000000.000000

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Fiscal Year Ending
Actions	5	Validated With Errors	<input checked="" type="checkbox"/>	GREEN, CUR...	435010004	08141985	2018

# Show Errors function

- Curtis Green display the ERR-Hours must be greater than zero error, but are there other errors with this row?
- Click the Actions button at the start of the row and select Show Errors. 



The screenshot shows a software interface with a table. At the top, there are buttons for 'New Row', 'Validate', 'Process', 'Void', and 'Download'. Below these is a table with columns: 'Tools', 'Seq No', 'Import Detail Status', 'Resubmit Flag', 'Name', and 'M'. The first row of data is highlighted in blue and contains: 'Actions', '5', 'Validated With Errors', a checked checkbox, and 'GREEN, CUR...'. A dropdown menu is open over the 'Actions' cell, showing two options: 'Delete' and 'Show Errors'. A red arrow points from the text 'Show Errors' in the list to the 'Show Errors' option in the dropdown menu.

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	M
Actions	5	Validated With Errors	<input checked="" type="checkbox"/>	GREEN, CUR...	4

Delete

Show Errors

# Import Errors and Exceptions

Import Errors and Exceptions

Close

Page 1 of 1

**Errors**

Tools	Seq No	Nu...	Exception Filter	Message
	5	1	IMPORT_WR...	Hours must be greater than zero if wage type is Hourly and either Contribution amount or WNC amount is gr...

Page 1 of 1

**Exceptions**

Tools	Seq No	Nu...	Exception Filter	Message
-------	--------	-------	------------------	---------

- The Show Errors function takes you to the Import Errors and Exceptions page. This page is broken into separate areas for Messages, Errors, and Exceptions that can all be viewed for that particular record.
- There are no other errors or exceptions to be fixed for this record. (Messages would appear at the top of the screen above Errors.)
- After reviewing, click the Close button at the top left.

# Correcting error for no hours reported

<a href="#">Tools</a>	Name	Member SSN	Member D...	Fiscal Ye...	Wage Type	Work Status	BASE	DRCC	OT	SUP	CONTRIB	Hours	Days
<a href="#">Actions</a>	GREEN, CUR...	435010004	08141985	2018	Hourly	ACTIVE - Ac...	001000.00	000000.00	000000.00	000000.00	000075.00	0000	000.00

- Curtis Green was reported with \$1,000.00 base salary but zero (0) hours to support his earnings. To fix this, select edit from the top left (if not already in edit mode) and click inside the box under the Hours column.
- For this example, 100 hours of service will be entered (\$10/hour position). Then click Save in the top left.

# Return to Exception Filter

- We fixed the first error that was listed in our exception filter, but there was also another error: ERR-fiscal year must be in current fiscal year.
- One record, Jane Yellow, appeared below showing 2017 as the fiscal year on the work history report. Since this is a January report, the year must show as 2018.

**Details**

Status:  Exception Filter:  Display

No	Import Message	Import Detail Status	Resubmit Flag	Header
1		Validated Successful	<input checked="" type="checkbox"/>	R003404012018000008000008000.00000000000.00000000000.0000

date Process Void Download

Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Fiscal Year Ending	Wage Type
Validated With Errors	<input checked="" type="checkbox"/>	YELLOW, JANE	435010001	10101980	2017	Hourly

# Error-Correct fiscal year

- Click inside the field under the Fiscal Year Ending column. Correct the year to show 2018.
- The Fiscal Year may be either the previous or current year in July, August or September reporting to accommodate balance of contract (BOC) reporting. All other months must be in the current fiscal year.
- Click Save to save changes.

**Details**

Status:  Exception Filter:

No	Import Message	Import Detail Status	Resubmit Flag	Header
1		Validated Successful	<input checked="" type="checkbox"/>	R003404012018000008000008000.0000000000.0000000000

date

Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Fiscal Year Ending	Wage Ty
2 Validated With Errors	<input checked="" type="checkbox"/>	YELLOW, JANE	435010001	10101980	2018	Hourly

# Validate work history report

Summary Details

Import Detail Status: All

<u>Tools</u>	Seq No	Import Message	Import Detail Status
<u>Actions</u>	1		Validated Successful

←

New Row Validate Process Void Download

<u>Tools</u>	Seq No	Import Detail Status	Resubmit Flag	Na
<u>Actions</u>	2	Validated With Errors	☑	YEL

Header Row

- When all corrections have been made, select the Validate button to re-validate your report. The Validate button is about halfway down the screen on the left below the Header Row.
- OR, you can close this screen and use the File History screen and Validate the file using the Actions button.

# Validated Successfully

<u>Tools</u>	Jer Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start
<u>Actions</u>	0657	Validated	01/05/2018	Work Report	R003404 Jan ...	Validated Successfully	01/05/2018

- Validate
- Details
- Process
- Void
- Download

- All corrections have been made and the File has been Validated Successfully. Further to the right are the row counts that show that 8 rows were imported, and 8 rows are valid. Since there are no invalid or exception rows, the file can be processed.
- Click the Actions button and select the Process option to Process the account.

# Processing the Work Report File

**File History**

Close

Report Type: All Date Range: 11/19/2017 To: 01/18/2018

Status: All

<u>Tools</u>	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows
<u>Actions</u>	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Successfully	01/05/2018	01/18/2018	8 sec	8	8	8	0	0

- The file has been Processed Successfully, processing 8 rows of data.
- Click the Close button at the top left to return to the Account Tab.

# Refresh your Browser to see transaction

<a href="#">Tools</a>	Posting Date▼	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Emp Share Bal... E
<a href="#">Actions</a>	01/18/2018	01/01/2018	1969727	WH Report	Billing Rpt 2018-01	Open	Pending	03/02/2018	\$2,539.20
<a href="#">Actions</a>	12/13/2017	12/01/2017	1968298	WH Report	Billing Rpt 12/31/2017	Open	Initial	01/10/2018	\$317.40
<a href="#">Actions</a>	11/14/2017	11/01/2017	1966389	WH Report	Brow 5897 test	Open	Initial	12/10/2017	\$0.00

- Your new work report file has been processed successfully, but there is one more step needed before it is truly approved in ESS. If your file transaction is not visible in your Account Tab activity, use the browser refresh icon or log out/log in so the new data can be pulled into the system.
- After refreshing your browser, this work report should be the most current transaction at the top of your page. **The Report Status is showing Pending.**

# WH Report Actions

- The Jan 2018 Work History report has been processed.
- The Actions button will offer options to see Details or Edit the January 2018 work history report.

<a href="#">Tools</a>	Posting Date▼	Activity Date	Trans #	Trans Type	Trans Identifier
<a href="#">Actions</a>	01/18/2018	01/01/2018	1969727	WH Report	Billing Rpt 2018-01
Details	17	12/01/2017	1968298	WH Report	Billing Rpt 12/31/2017
Edit	17	11/01/2017	1966389	WH Report	Brow 5897 test
Submit					

# Selecting Details option

**Transaction Details**

Close

Employer: 3404-SMOKEY PINES SD      Inserted Date: 01/18/2018  
Billing Entity: 3404 SMOKEY PINES SD      Updated Date: 01/18/2018  
Trans #: 1969727      Status: Open  
Identifier: Billing Rpt 2018-01

**Transaction**

Type:	WH Report	Member Savings Contributions:	600.00	Retro:	<input type="checkbox"/>
Identifier:	Billing Rpt 2018-01	Member POS Installment:	0.00	Interest Type:	Delinquency
Analyst:		Employer Share:	2,539.20	Rate:	
Activity Date:	01/01/2018	Employer Premium Assistance:	66.40	Frequency:	
Due Date:	03/02/2018	Healthcare:	0.00	Tax Election:	
Transaction Process Code:		Total:	\$3,205.60	Print On Statement:	<input checked="" type="checkbox"/>
FI Doc #:		Charge Type:	Debit Val		
Notes:					

- Transaction Details will show the amounts the school will be billed in each category according to the information reported on the work history report.
- The transaction # can be found at the top of this screen.
- A total of the charges is provided at the bottom of the column.

# Selecting Edit Option

- The Work Report Editor allows you to view the members on your approved work report.
- The term “edit” is misleading because there are no changes that can be made after the report is submitted.
- WH Report can be filtered using the exception filter if you approved your report with errors/exceptions.
- The columns for all work report fields appear as you scroll to the right.

**Work Report Editor**

Close

Employer: SMOKEY PINES SD      Report Type: Regular      Report Period: 01/01/2018 - 01/31/2018  
Billing Entity: 3404 SMOKEY PINES SD      Report Status: Pending      Identifier: #1969727 - Billing Rpt 2018-01

Summary      **Detail**

Barg Unit Id: 01 - MASTER AGREEME      Exception Filter: Please Select

Add Member      Delete Selected

Tools	<input type="checkbox"/>	Actions	Name/SSN	SSN	Birth Dt	FY	Wage Type	Work Status	Base	URCC	OT	ST
<a href="#">Actions</a>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	YELLOW, JANE	435-01-0001		2018	Hourly	ACTIVE - Acti...	\$1,000.00	\$0.00	\$0.00	
<a href="#">Actions</a>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	PINK, JOHN	435-01-0002		2018	Salaried	ACTIVE - Acti...	\$1,000.00	\$0.00	\$0.00	
<a href="#">Actions</a>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	ORANGE, SA...	435-01-0003		2018	Per Diem	ACTIVE - Acti...	\$1,000.00	\$0.00	\$0.00	
<a href="#">Actions</a>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	GREEN, CUR...	435-01-0004		2018	Hourly	ACTIVE - Acti...	\$1,000.00	\$0.00	\$0.00	
<a href="#">Actions</a>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	PURPLE, FRA...	435-01-0005		2018	Salaried	ACTIVE - Acti...	\$1,000.00	\$0.00	\$0.00	
<a href="#">Actions</a>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	RED, BARBARA	435-01-0006		2018	Per Diem	ACTIVE - Acti...	\$1,000.00	\$0.00	\$0.00	
<a href="#">Actions</a>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	BLUE, DEB	435-01-0007		2018	Salaried	ACTIVE - Acti...	\$1,000.00	\$0.00	\$0.00	
			Work Report T...						\$8,000.00	\$0.00	\$0.00	
									\$8,000.00	\$0.00	\$0.00	

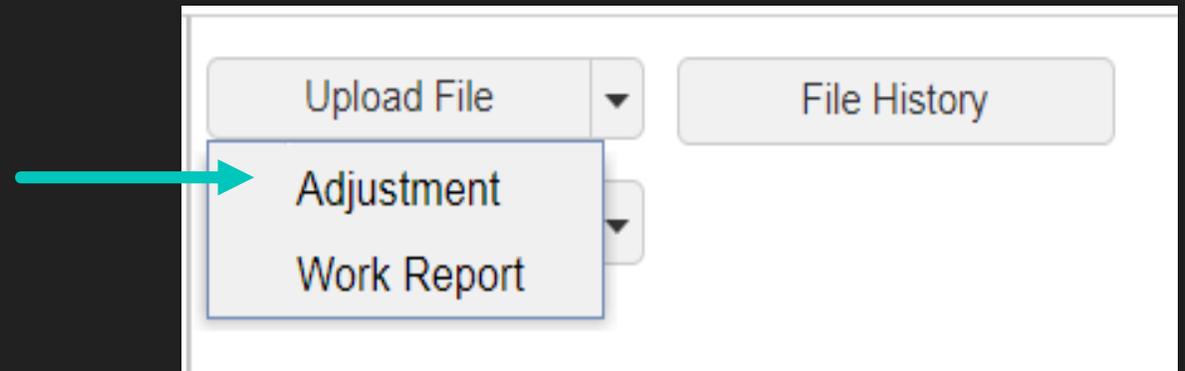


# Adjustment Report Uploads

Importing your adjustment file

# Importing an Adjustment File

- A reminder: There are **NO CHANGES** to the format of the Adjustment Template for ESS.
- Click the Upload File button. Select Adjustment.



# Select your File

- File selected will show in gray.
- Import Description updated to my preference.
- Click the Next button in the bottom right corner. To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- A message stating “Processing file....Please wait” will display on your screen while processing.

### Upload Adjustment

1 File Upload 2 Processing

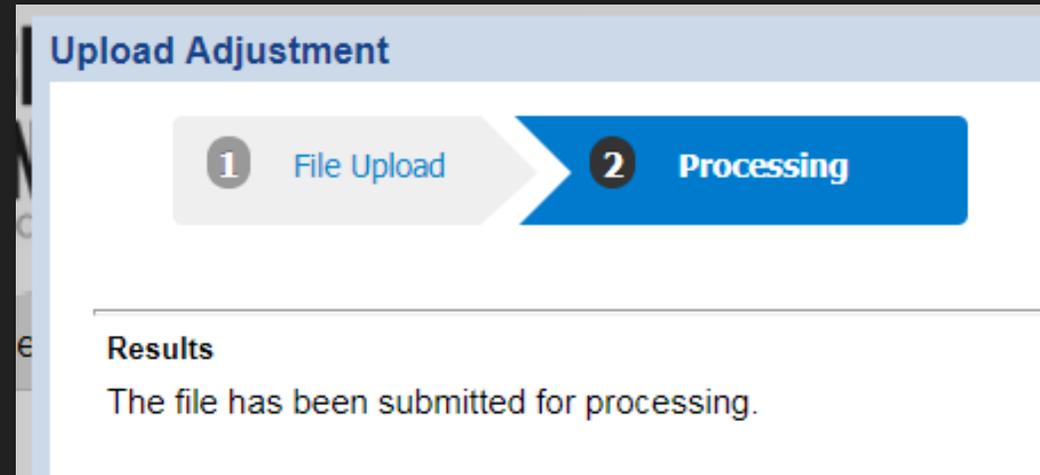
Import Filename:

Import Description:

No Parameters

# Processing the Adjustment File

- After the “Processing file...please wait” message, the screen will show your file results.
- You can view the details of your file using the Details button in the bottom right corner.



# Details Page

- Clicking the Details button will take you to the Details page and automatically put you in Edit mode.
- The Adjustment file was Validated Successfully.
- There are two pages of data but already exceptions and errors are visible.

**Details**

Save Cancel

File Type Adjustment File Load Date 02/10/2018  
Import Description A003404 Jan 18 Adjs

Summary **Details**

Import Detail Status: All Exception Filter: All

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.0000000000.0000000000.00

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wa
Actions	2	Validated With Exceptions	<input checked="" type="checkbox"/>	YELLOW, JANE	435010001	10101980	Payroll Correc...	Yes
Actions	3	Validated Successful	<input checked="" type="checkbox"/>	PINK, JOHN	435010002	09151972	Payroll Correc...	Yes
Actions	4	Validated Successful	<input checked="" type="checkbox"/>	ORANGE, SA...	435010003	12241976	Payroll Correc...	Yes
Actions	5	Validated Successful	<input checked="" type="checkbox"/>	GREEN, CUR...	435010004	08141985	Payroll Correc...	Yes
Actions	6	Validated With Errors	<input checked="" type="checkbox"/>	PURPLE, FRA...	435010005	06221970	Payroll Correc...	No

Page 1 of 2

# Exception Filter

Exception Filter:		All	Display Rows: Fr
Resubmit Flag	Header		
<input checked="" type="checkbox"/>	A003404000	ERR- WNC amount must be zero for Salaried members WRN- Contribution rate should be Amount	

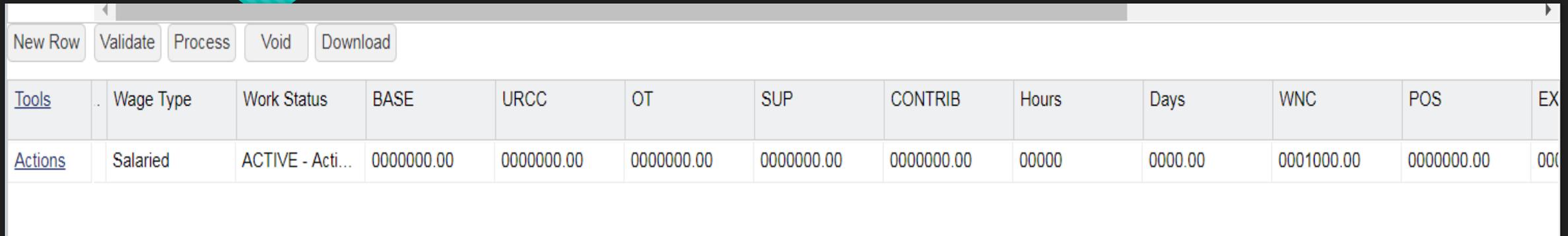
- Use the arrow in the Exception Filter box to view Exceptions and Errors on your Adjustment File.
- There is one error message (ERR) and one exception message (WRN warning)

# ERR-WNC amount error

Summary		<u>Details</u>												
Import Detail Status:	All	Exception Filter:	ERR- WNC amount must be zero for Sala								Display Rows: From		To:	
<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header									
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.0000000000.0000000000.0000000000.0000000000.0000000000.0000000000.0001012									
<hr/>														
<a href="#">New Row</a>	<a href="#">Validate</a>	<a href="#">Process</a>	<a href="#">Void</a>	<a href="#">Download</a>										
<a href="#">Tools</a>	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wage Indicator	Contrib Withheld	Fiscal Year...	Wage Type	Work Status		
<a href="#">Actions</a>	6	Validated With Errors	<input checked="" type="checkbox"/>	PURPLE, FRANK	435010005	06221970	Payroll Correc...	No	No	2018	Salaried	ACTIVE - Acti...		

- There is an error in Frank Purple's adjustment row. As a salaried member, he should not be reported with WNC because he is qualified from day 1 of service.
- The Adjustment reason code was entered as Payroll Correction, but there were no contributions withheld.

# ERR-WNC amount cont.

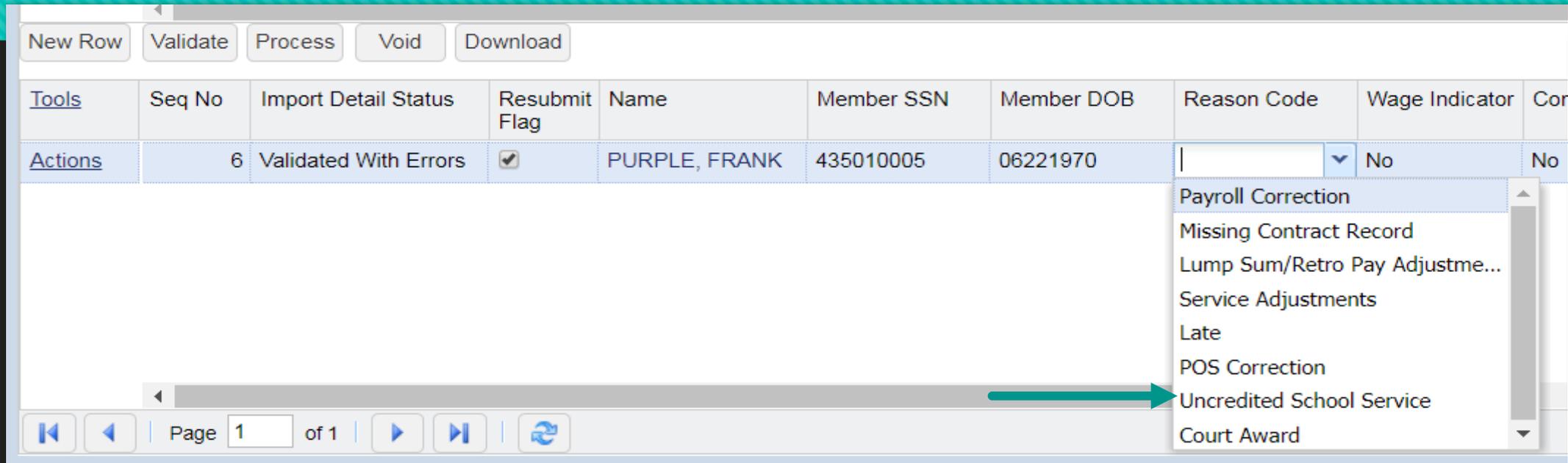


The screenshot shows a software interface with a table. At the top, there are buttons for 'New Row', 'Validate', 'Process', 'Void', and 'Download'. Below these is a table with the following columns: Tools, Wage Type, Work Status, BASE, URCC, OT, SUP, CONTRIB, Hours, Days, WNC, POS, and EX. The first row of data shows 'Salaried' under Wage Type, 'ACTIVE - Acti...' under Work Status, and '0000000.00' under BASE, URCC, OT, SUP, and CONTRIB. The Hours column shows '00000', Days shows '0000.00', and WNC shows '0001000.00'. The POS column shows '0000000.00' and EX shows '000'.

Tools	Wage Type	Work Status	BASE	URCC	OT	SUP	CONTRIB	Hours	Days	WNC	POS	EX
<a href="#">Actions</a>	Salaried	ACTIVE - Acti...	0000000.00	0000000.00	0000000.00	0000000.00	0000000.00	00000	0000.00	0001000.00	0000000.00	000

- Use the gray scroll bar at the bottom of your screen to scroll to the right so you can see that member Frank Purple has \$1,000 reported in the WNC column.
- There is also no service reported with these wages. Click inside the Days box to add service days if needed.
- **NEW:** Leading zeroes are not needed when making corrections, just enter the corrected value and apply/save your changes.

# Reason Code options



The screenshot shows a data entry interface with a table and a dropdown menu. The table has columns for Seq No, Import Detail Status, Resubmit Flag, Name, Member SSN, Member DOB, Reason Code, Wage Indicator, and Cor. The first row of data is highlighted, showing Seq No 6, Import Detail Status 'Validated With Errors', Resubmit Flag checked, Name 'PURPLE, FRANK', Member SSN 435010005, Member DOB 06221970, Reason Code field with a dropdown arrow, Wage Indicator 'No', and Cor 'No'. A dropdown menu is open from the Reason Code field, listing options: Payroll Correction, Missing Contract Record, Lump Sum/Retro Pay Adjustme..., Service Adjustments, Late, POS Correction, Uncredited School Service, and Court Award. A green arrow points to 'Uncredited School Service'.

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wage Indicator	Cor
Actions	6	Validated With Errors	☑	PURPLE, FRANK	435010005	06221970	▼	No	No

- Payroll Correction
- Missing Contract Record
- Lump Sum/Retro Pay Adjustme...
- Service Adjustments
- Late
- POS Correction
- Uncredited School Service
- Court Award

- When you click inside the Reason Code field, an arrow will populate at the end of the box. Click the arrow for Reason Code options. Rather than Payroll Correction, Purple's WNC should be reported as Uncredited School Service. Select the desired code.
- You may save after each row is corrected, or you may wait until all corrections are made and then click save.

# Validate file

- After corrections are made you may wish to validate the file again to be sure your corrections are valid.
- Save changes first, then click the Validate button.
- You can also validate from the Actions button in the File History screen.
- Clicking the Close button will take you back to the File History screen.

**Details**

Edit Close

File Type Adjustment File Load Date 02/10/2018  
Import Description A003404 Jan 18 Adjs

Summary **Details**

Import Detail Status: All Exception Filter: ERR- WNC amount must be zero for Sala

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.00000000000.00000000000.00

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wage In
Actions	6	Validated With Errors	<input checked="" type="checkbox"/>	PURPLE, FRANK	435010005	06221970	Uncredited Sc...	No

# File History Screen

**File History**

Close

Report Type: All Date Range: 12/12/2017 To: 02/10/2018

Status: All

<a href="#">Tools</a>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Row
<a href="#">Actions</a>	400693	Validated	02/10/2018	Adjustment	A003404 Jan ...	Validated with Exceptions	02/10/2018	02/10/2018	5 sec	8	
<a href="#">Actions</a>	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Successfully	01/05/2018	01/18/2018	8 sec	8	

- The blue row is the adjustment file. The file has been validated and imported with 8 rows, but the status still shows Validated with Exceptions. Our error was corrected, but there was an exception listed in the exception filter that still needs to be reviewed.

# Actions button

**File History**

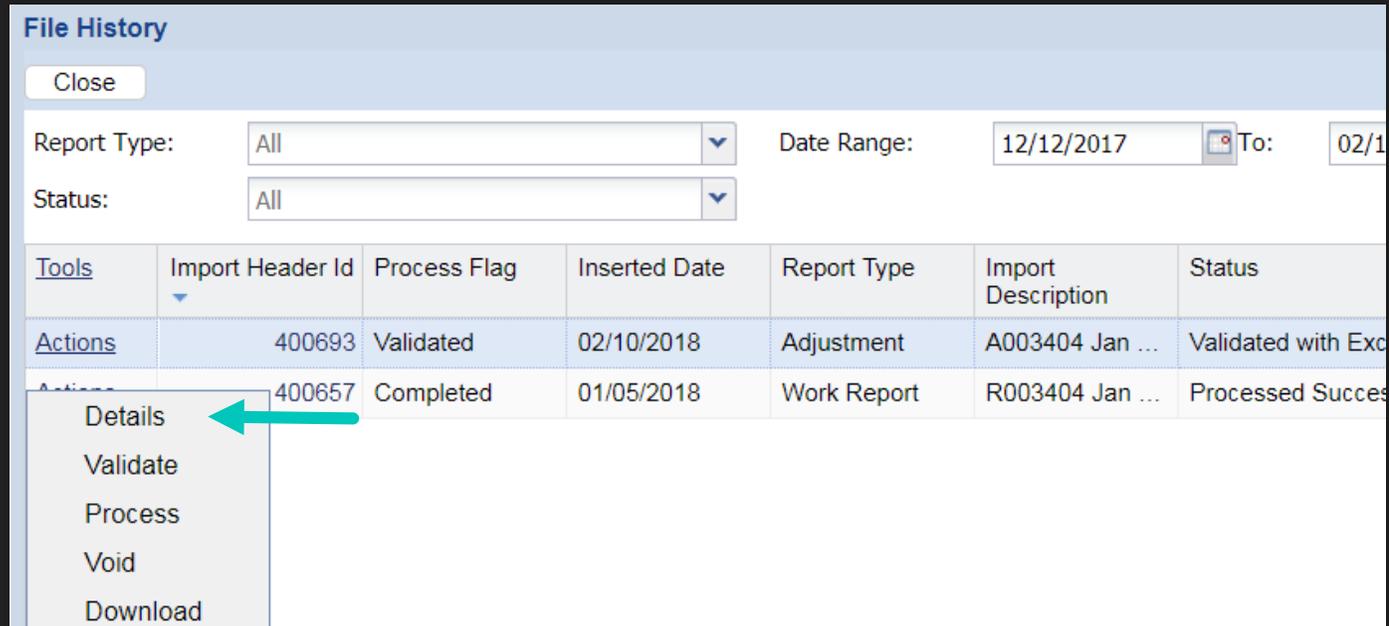
Close

Report Type: All Date Range: 12/12/2017 To: 02/1

Status: All

<u>Tools</u>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status
<u>Actions</u>	400693	Validated	02/10/2018	Adjustment	A003404 Jan ...	Validated with Exc
<u>Actions</u>	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Succes

Details  
Validate  
Process  
Void  
Download



- Click the Actions button at the start of the row. Select Details to return to Details page.

# Exception Filter

- Select WRN-Contribution rate should be Amount in the Exception Filter.
- All records on the adjustment file with this exception will populate below.

**Details**

Save Cancel

File Type Adjustment File Load Date 02/10/2018  
Import Description A003404 Jan 18 Adjs

Summary **Details**

Import Detail Status: All Exception Filter: All Display

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.00000000000.00000000000.00000000000

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wage Indic
<a href="#">Actions</a>	2	Validated With Exceptions	<input checked="" type="checkbox"/>	YELLOW, JANE	435010001	10101980	Payroll Correc...	Yes
<a href="#">Actions</a>	3	Validated Successful	<input checked="" type="checkbox"/>	PINK, JOHN	435010002	09151972	Payroll Correc...	Yes
<a href="#">Actions</a>	4	Validated Successful	<input checked="" type="checkbox"/>	ORANGE, SA...	435010003	12241976	Payroll Correc...	Yes
<a href="#">Actions</a>	5	Validated Successful	<input checked="" type="checkbox"/>	GREEN, CUR...	435010004	08141985	Payroll Correc...	Yes

Page 1 of 2

# WRN-Contribution rate exception

Summary		<u>Details</u>						
Import Detail Status:	All	Exception Filter:	WRN- Contribution rate should be Amour					
<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header			
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.00000000000.00000000000.0000			
New Row Validate Process Void Download								
<a href="#">Tools</a>	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wage
<a href="#">Actions</a>	2	Validated With Exceptions	<input checked="" type="checkbox"/>	YELLOW, JANE	435010001	10101980	Payroll Correc...	Yes

- Only one record, Jane Yellow, was found with this exception.

# WRN-Contribution rate cont.

New Row Validate Process Void Download											
<a href="#">Tools</a>	Fiscal Ye...	Wage Type	Work Status	BASE	URCC	OT	SUP	CONTRIB	Hours	Days	WNC
<a href="#">Actions</a>	2018	Hourly	ACTIVE - Acti...	0001000.00	0000000.00	0000000.00	0000000.00	0000065.00	00160	0000.00	0000000

- After scrolling to the right, the base wages show \$1,000 but the CONTRIB field only shows \$65.00. The contributions would be correct for someone who is a TD 6.5% member but ESS is telling us this is not correct.

# Close Details page

- The contribution rate should be verified before corrections are made to the transaction row.
- The contribution rate and membership class is available using your **approved WH Reports** on the Account Tab.
- Click the Cancel button on the Details screen. If you have made other changes but have not saved, Save first, then Close the Details page.

**Details**

Save **Cancel**

File Type Adjustment File Load Date 02/10/2018  
Import Description A003404 Jan 18 Adjs

Summary Details

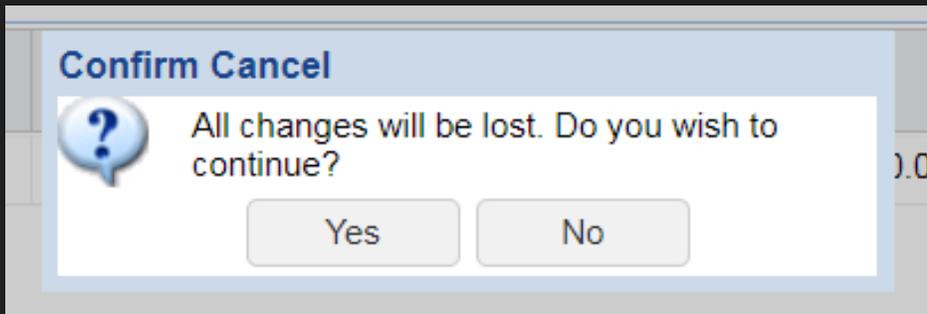
Import Detail Status: All Exception Filter: WRN- Contribution

<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.00

New Row Validate Process Void Download

<a href="#">Tools</a>	Fiscal Ye...	Wage Type	Work Status	BASE	URCC	OT
<a href="#">Actions</a>	2018	Hourly	ACTIVE - Acti...	0001000.00	0000000.00	0000000.00

# Confirm Cancel



- When using the Cancel button, ESS will provide you a chance to rethink your decision.
- Please be sure to save any other corrections made before leaving the details page.

# Close button

**Details**

Edit Close

File Type Adjustment File Load Date 02/10/2018  
Import Description A003404 Jan 18 Adjs

Summary **Details**

Import Detail Status: All Exception Filter: WRN- Contribution r

<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.0000

- To leave details page, click Close. This will return you to the File History page. Click Close to leave the File History page. This will take you back to the Account Tab.

# Account Tab to WH Report Details

Home   Profile   **Account**   Roster   Documents   Contacts   Admin

Account

Billing Location: 3404 SMOKEY PINES SD   Upload File   File History

Trans Type: All   Manual Report

Status: Open

Report Status: All

<a href="#">Tools</a>	Posting Date	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Emp Share Bal...
<a href="#">Actions</a>	01/18/2018	01/01/2018	1969727	WH Report	Billing Rpt 2018-01	Open	Released	03/02/2018	\$2,539.20
<a href="#">Actions</a>	12/13/2017	12/01/2017	1968298	WH Report	Billing Rpt 12/31/2017	Open	Released	01/10/2018	\$317.40
<a href="#">Actions</a>	11/14/2017	11/01/2017	1966389	WH Report	Brow 5897 test	Open	Released	12/10/2017	\$1,587.00

- Use the Actions button on the row for the most recent WH Report. Select **Edit** from the options listed.

# Work Report Editor

- The Edit button takes you to the Work Report Editor screen.
- Jane Yellow is the first person listed on this work history report but if she wasn't you would use the Name/SSN drop down arrow on the right side of that field, go to Filters, and enter her name or SSN to find her within the work history report.

Work Report Editor

Close

Employer: SMOKEY PINES SD Report Type: Regular  
Billing Entity: 3404 SMOKEY PINES SD Report Status: Released

Summary **Detail**

Barg Unit Id: 01 - MASTER AGREEME Exception Filter: Please Select

Add Member Delete Selected

Tools		Actions	Name/SSN	SSN	Birth Dt	FY	Wage Type
<a href="#">Actions</a>	<input type="checkbox"/>		YELLOW, JAN		/1980	2018	Hourly
<a href="#">Actions</a>	<input type="checkbox"/>		PINK, JOHN		/1972	2018	Salaried
<a href="#">Actions</a>	<input type="checkbox"/>		ORANGE, SA.		/1976	2018	Per Diem
<a href="#">Actions</a>	<input type="checkbox"/>		GREEN, CUR.				ourly
<a href="#">Actions</a>	<input type="checkbox"/>		PURPLE, FRA...	435-01-0005	06/22/1970	2018	Salaried
<a href="#">Actions</a>	<input type="checkbox"/>		RED, BARBARA	435-01-0006	05/20/1969	2018	Per Diem
<a href="#">Actions</a>	<input type="checkbox"/>		BLUE, DEB	435-01-0007	11/12/1993	2018	Salaried

Work Report T...

# Member found

**Work Report Editor**

Close

Employer: SMOKEY PINES SD      Report Type: Regular      Report Period:  
Billing Entity: 3404 SMOKEY PINES SD      Report Status: Released      Identifier:

Summary      **Detail**

Barg Unit Id: 01 - MASTER AGREEME      Exception Filter: Please Select

Add Member      Delete Selected

<a href="#">Tools</a>	<input type="checkbox"/>	Actions	Name/SSN	SSN	Birth Dt	FY	Wage Type	Work Status
<a href="#">Actions</a>	<input type="checkbox"/>	 	YELLOW, JANE	435-01-0001	10/10/1980	2018	Hourly	ACTIVE - Acti...

- When you have found the record you are looking for, use the gray scroll bar at the bottom of the screen to view the rest of her transaction row.

# Finding the Contribution Rate and Class

Add Member Delete Selected

Tools	<input type="checkbox"/>	DAYS	WNC	POS	EXSAL	NRCC	Enroll Dt	Mem Class	Contrib Rt	W/hold Notif	Mem Savings	ME
Actions	<input type="checkbox"/>	0	\$0.00	\$0.00	\$0.00	\$0.00	01/01/2018	TE	7.5		\$75.00	

- Use the scroll bar at the bottom of the page to scroll to the right. The contribution rate and class are both listed on your approved work history reports.
- Jane Yellow is part of membership class TE with a 7.5% contribution rate. For \$1,000 wages, \$75 in contributions should be withheld.
- Use the Close button at the top of the screen to return to the Accounts tab.

# Accounts tab to File History button

Home   Profile   **Account**   Roster   Documents   Contacts   Admin

Account

Billing Location: 3404 SMOKEY PINES SD

Trans Type: All

Status: Open

Report Status: All

Upload File   File History

Manual Report



<a href="#">Tools</a>	Posting Date	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Emp Share Bal...
<a href="#">Actions</a>	01/18/2018	01/01/2018	1969727	WH Report	Billing Rpt 2018-01	Open	Released	03/02/2018	\$2,539.20
<a href="#">Actions</a>	12/13/2017	12/01/2017	1968298	WH Report	Billing Rpt 12/31/2017	Open	Released	01/10/2018	\$317.40
<a href="#">Actions</a>	11/14/2017	11/01/2017	1966389	WH Report	Brow 5897 test	Open	Released	12/10/2017	\$1,587.00

- To return to adjustment file to continue correcting Jane Yellow's contributions, click the File History button.

# Adjustment Details

- Click Actions button on Adjustment file row and select Details to return to Details page.

**File History**

Close

Report Type: All Date Range: 12/12/2017 To: 02/10/2018

Status: All

<a href="#">Tools</a>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File
<a href="#">Actions</a>	400693	Validated	02/10/2018	Adjustment	A003404 Jan ...	Validated with Exceptions	02/10/2018
<a href="#">Actions</a>	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Successfully	01/05/2018

- Details
- Validate
- Process
- Void
- Download

# Use Exception Filter to locate member

**Details**

Save Cancel

File Type Adjustment File Load Date 02/10/2018  
Import Description A003404 Jan 18 Adjs

Summary **Details**

Import Detail Status: All Exception Filter: WRN- Contribution rate should be Amour Display Row

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.000000000000.000000000000.000000000000.0

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wage Indicator
Actions	2	Validated With Exceptions	<input checked="" type="checkbox"/>	YELLOW, JANE	435010001	10101980	Payroll Correc...	Yes

- Use the Exception Filter to find the member you need to correct.
- Using the gray scroll bar, scroll right to make the correction in the CONTRIB field.

# Make correction in CONTRIB field

<a href="#">Tools</a>	Fiscal Year Ending	Wage Type	Work Status	BASE	URCC	OT	SUP	CONTRIB	Hours	Days
<a href="#">Actions</a>	2018	Hourly	ACTIVE - Acti...	0001000.00	0000000.00	0000000.00	0000000.00	75.00	00160	0000.00

- Click inside CONTRIB field box and enter the corrected amount of contributions. Instead of \$65.00, her adjustment transaction row now shows \$75.00.

# Save, then Validate file

- Click Save to save your corrections.
- Because this is our last exception and/or error to fix, the file is also ready to be validated again.
- Click Validate after you have saved your work.

**Details**

Save Cancel

File Type Adjustment File Load Date 02/10/2018  
Import Description A003404 Jan 18 Adjs

Summary **Details**

Import Detail Status: All Exception Filter: WRN- Contribution rate

<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
<a href="#">Actions</a>	1		Validated Successful	<input checked="" type="checkbox"/>	A003404000008000008000.000000

New Row Validate Process Void Download

<a href="#">Tools</a>	Fiscal Year Ending	Wage Type	Work Status	BASE	URCC	O
<a href="#">Actions</a>	2018	Hourly	ACTIVE - Acti...	0001000.00	0000000.00	00

# Validated Successfully

**File History**

Close

Report Type: All Date Range: 12/12/2017 To: 02/10/2018

Status: All

<a href="#">Tools</a>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Re
<a href="#">Actions</a>	400693	Validated	02/10/2018	Adjustment	A003404 Jan ...	Validated Successfully	02/10/2018	02/10/2018	< 1 sec	8	
<a href="#">Actions</a>	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Successfully	01/05/2018	01/18/2018	8 sec	8	

- Use the Close button to return to the File History screen.
- The Adjustment file has been Validated Successfully with 8 rows. There should no longer be any rows with errors or exceptions. To check, scroll to the right to see the rest of the row details.

# Adjustment file details

**File History**

Close

Report Type: All Date Range: 12/12/2017 To: 02/10/2018

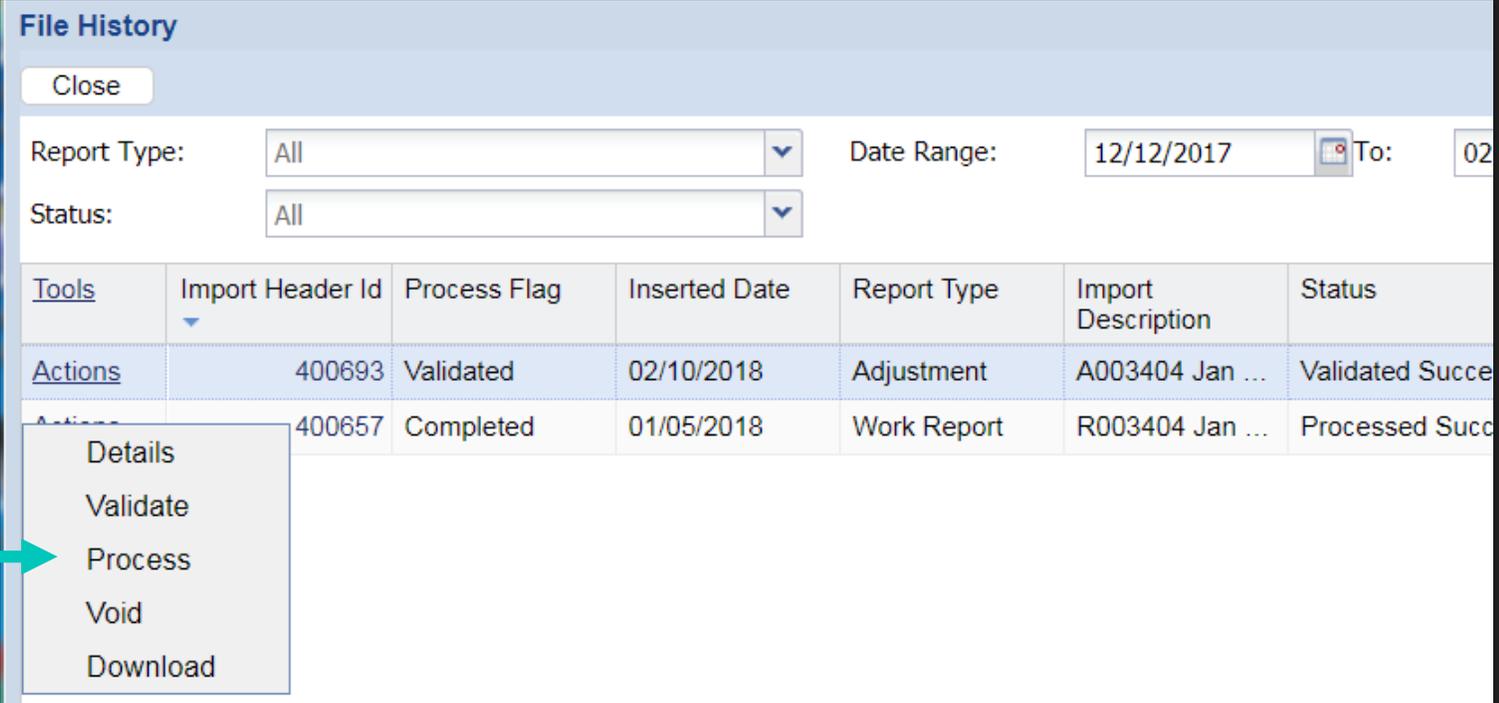
Status: All

Tools	Id Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By
<a href="#">Actions</a>	118	02/10/2018	< 1 sec	8	8	8	0	0			KRGOODLING
<a href="#">Actions</a>	118	01/18/2018	8 sec	8	8	8	0	0			KRGOODLING

- The blue row is the adjustment file. The file successfully imported 8 rows and there are no errors or exceptions remaining.

# Process the file

- After scrolling back to the left, click the Actions button and select the Process option to process the adjustment file.



The screenshot displays the 'File History' application window. At the top, there is a 'Close' button. Below it are filters for 'Report Type' (set to 'All'), 'Status' (set to 'All'), and 'Date Range' (set to '12/12/2017' to '02/...'). The main area contains a table with the following columns: Tools, Import Header Id, Process Flag, Inserted Date, Report Type, Import Description, and Status. Two rows are visible in the table:

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status
<a href="#">Actions</a>	400693	Validated	02/10/2018	Adjustment	A003404 Jan ...	Validated Succ...
<a href="#">Actions</a>	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Succ...

An 'Actions' menu is open over the first row, with a red arrow pointing to the 'Process' option. The menu includes the following items: Details, Validate, Process, Void, and Download.

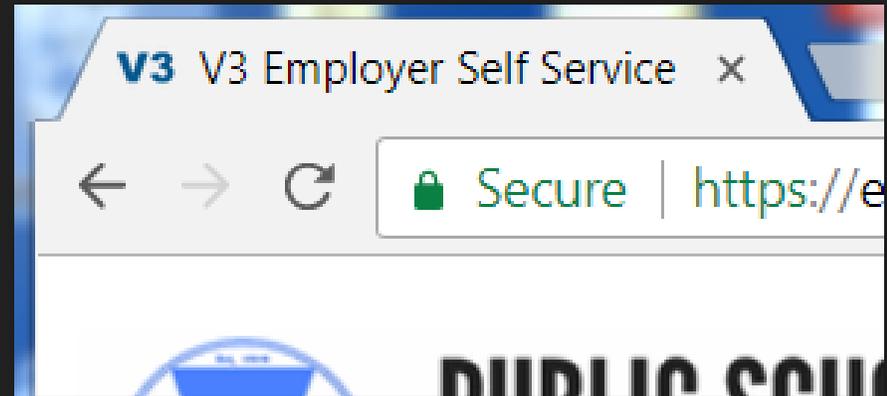
# Processed Successfully

<a href="#">Tools</a>	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Rows
<a href="#">Actions</a>	400693	Completed	02/10/2018	Adjustment	A003404 Jan ...	Processed Successfully	02/10/2018	02/10/2018	10 sec	8	
<a href="#">Actions</a>	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Successfully	01/05/2018	01/18/2018	8 sec	8	

- The Adjustment file has been successfully processed.
- Click Close in the top left corner to return to the Accounts Tab.

# Refresh the Browser

- Files that were processed should appear in your Account tab right away but you may need to refresh your browser to pull these new transactions in so you can view them.



# Transaction in Account Tab

Home Profile **Account** Roster Documents Contacts Admin

Account

Billing Location: 3404 SMOKEY PINES SD

Trans Type: All

Status: Open

Report Status: All

Upload File File History

Manual Report

<a href="#">Tools</a>	Posting Date	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Emp Share Bal...	Em
<a href="#">Actions</a>	02/10/2018	02/10/2018	1970996	WH Adj.	Adjustment Rpt. - FY 2018	Open	Pending	02/10/2018	\$0.00	
<a href="#">Actions</a>	02/10/2018	02/10/2018	1970995	WH Adj.	Adjustment Rpt. - FY 2018	Open	Pending	02/10/2018	\$2,221.80	
<a href="#">Actions</a>	01/18/2018	01/01/2018	1969727	WH Report	Billing Rpt 2018-01	Open	Released	03/02/2018	\$2,539.20	
<a href="#">Actions</a>	12/13/2017	12/01/2017	1968298	WH Report	Billing Rpt 12/31/2017	Open	Released	01/10/2018	\$317.40	
<a href="#">Actions</a>	11/14/2017	11/01/2017	1966389	WH Report	Brow 5897 test	Open	Released	12/10/2017	\$1,587.00	

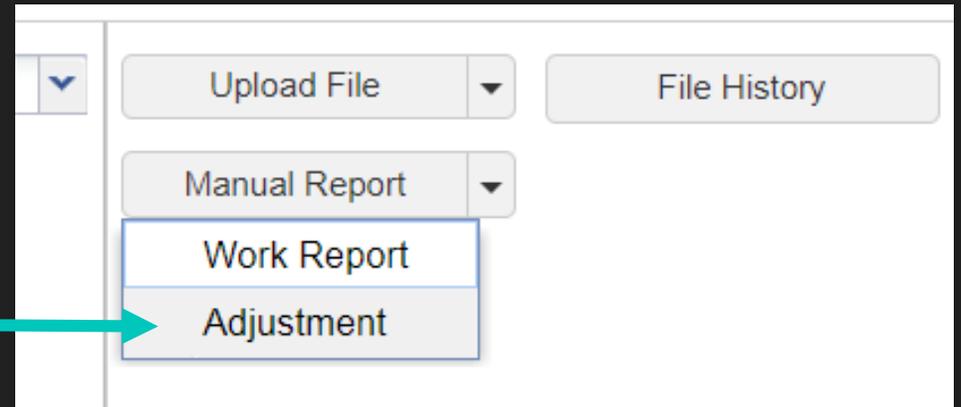
- The Report Status shows Pending for the Adjustment Report that was just processed.

# Manual Adjustments

Your guide to correcting accounts individually.

# Account Tab

- To do a manual adjustment, you will use the Manual Report button drop down arrow to select Adjustment.



# Important: Rename Identifier

- The Generate Adjustment Report screen will have your Employer name at the top, just above the Identifier.
- **TIP:** The system populates the Identifier, but lists this as a Billing Report. **You must rename this Identifier to something you can identify as a manual adjustment** instead or this may cause confusion when you are reviewing your Employer Statement of Account.

The screenshot shows a software interface with a window titled "Generate Adjustment Report". At the top, there are tabs for "Account", "Roster", and "Documents". The form contains the following fields:

- Employer: 1001-PA EXAMPLE SCHOOL DISTRICT
- Billing Entity: 1001-PA EXAMPE SCHOOL DISTRICT
- Identifier: Billing Rpt 02/17/2018

The "Identifier" field and its value are circled in red. At the bottom of the form, there are two buttons: "Generate" on the left and "Close" on the right.

# Generate the Adjustment

- After your Identifier is renamed, click the Generate button.
- Please note, this button is on the left, rather than the right like most screens.

Generate Adjustment Report

Employer: 1001-PA EXAMPLE SCHOOL DISTRICT  
Billing Entity: 1001 PA EXAMPE SCHOOL DISTRICT

Identifier:

# Adjustment screen

**Adjustment** 

Save Apply Cancel

Employer: PA EXAMPLE SCHOOL DISTRICT Report Type: Adjustment Report Period: 02/17/2018 - 02/17/2018 # of Participants: 0  
Billing Entity: 1001 PA EXAMPE SCHOOL DISTF Report Status: Initial Identifier: #1999321 - Adj ELK, JANE # of Rows: 0

Summary **Detail**

Barg Unit Id: 01 - MASTER AGREEME Exception Filter: Please Select

Add Member Delete Selected

 Tools	Actions	Name/SSN	SSN	Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC
---	---------	----------	-----	----------	-------------	----------------	------------------	----	-----------	-------------	------	------

- You are in edit mode when you begin a manual adjustment.
- Click the Add Member button to create an adjustment row.

# New adjustment line created

Add Member		Delete Selected														
 Tools	Actions	Name/SSN	SSN	Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS
<a href="#">Actions</a>											\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

- Clicking the Add Member button will create an adjustment row.
- Each row created will have an Actions button on the far left.
- The adjustment line fields are set up in the same order as the work report.
- Double click inside the Name/SSN box to enter the member's name or SSN.

# Name/SSN field

Add Member Delete Selected

Tools	Actions	Name/SSN	SSN	Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS
Actions		ELK, JANE	435-01-0041	10/10/1980							\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

- The SSN and Birth Date will populate based on the name or SSN entered in the Name/SSN field.
- Please carefully review these details to make sure you are adjusting the correct member before moving on.

# Available fields

Add Member		Delete Selected															
Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS	DAYS	WNC	POS	EXSAL	NRCC
10/10/1980							\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00	\$0.00

- The fields listed on the adjustment row are in the same order as the work history report.
- **The first six fields that appear blank after the birth date are all mandatory fields.**
- The monetary and service fields only need to be entered if your adjustment requires those values.

# Reason Codes

Add Member Delete Selected

Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type
10/10/1980	<input type="text" value=""/>				

- Payroll Correction
- Missing Contract Record
- Lump Sum/Retro Pay Adjustment
- Service Adjustments
- Late
- POS Correction
- Uncredited School Service
- Court Award

- Many fields have a pull down menu on the right side of the field to make a selection. After selecting the appropriate reason code, continue moving through the fields.

# Wage Indicator and Contributions Withheld

Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status
10/10/1980	Payroll ...	Yes	Yes	2018		

- For most accounts the Wage Indicator should display as Yes. This means that you paid this member during the fiscal year you are correcting.
- The Contributions Withheld field is asking if you withheld contributions for the money you are adjusting. This may be a yes or no.
- The FY field does not have a pull down menu. Enter the fiscal year for the year the money was earned, not the year the money was paid.

# Wage Type and Work Status

- The Wage Type and Work Status both have pull down menus where you can select options. There are required fields.
- Jane Elk is an Hourly wage type who is Actively Working (ACTIVE).
- Remember, the **Wage Type** and **Work Status must match an open contract record** for the member you are adjusting.

Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR
Yes	2018	Hourly	<input type="text" value="Work Status: This field is required"/>				\$0.00	\$0

ACTIVE - Actively Working

ACTIWW - Waiver Request

ACTMLC - Activated Military Contributing Leave

ACTMLN - Activated Military Non-Contributing Leave

DECESD - Deceased

EXCHGC - Exchange Teacher Contributing Leave

EXCHGN - Exchange Teacher Non-Contributing Leave

LEAVEN - Any Other Leave Not Listed (Non-Contributing)

NOWORK - No Work

SABTLC - Sabbatical Contributing Leave

SSLSSC - Spec Sick Leave, School Sponsored (Contrib)

SSLSSN - Spec Sick Leave, School Sponsored (Non-Contrib)

SSLWCC - Spec Sick Leave, Worker's Compen (Contrib)

SSI WCN - Spec Sick Leave, Worker's Comn (Non-Contrib)

# Enter adjustment details

Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS	DAYS	WNC	POS	EXSAL	NRCC
10/10/1980	Payroll ...	Yes	Yes	2018	Hourly	ACTIVE - A...	\$500.00	\$0.00	\$0.00	\$0.00	\$37.50	25		\$0.00	\$0.00	\$0.00	\$0.00

- After all mandatory fields are entered, begin entering the required values for your member adjustment.
- This adjustment shows \$500.00 added to base, \$37.50 contributions withheld, and 25 hours to support the service rendered for the wages entered.
- The remaining fields can stay at \$0.00 or blank.

# Adding a new adjustment row

- Slide back to the left and click Apply at the top left.
- To continue adding members, click Add Member to create a new adjustment row.
- When you are finished with your manual adjustments, click Save.

### Adjustment

Save Apply Cancel

Employer: PA EXAMPLE SCHOOL DISTRICT Report Type: Adjustment  
Billing Entity: 1001 PA EXAMPE SCHOOL DISTF Report Status: Initial

Summary **Detail**

Barg Unit Id: 01 - MASTER AGREEME Exception Filter: Please Select

Add Member Delete Selected

 <a href="#">Tools</a>	Actions	Name/SSN	SSN	Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY
<a href="#">Actions</a>	 	ELK, JANE	435-01-0041	10/10/1980	Payroll ...	Yes	Yes	
<a href="#">Actions</a>		LTEST, STAN	435-01-0050	10/10/1980				

# Actions field

- The **blue** indicator in front of the member's name means the adjustment passes all validations. Clicking on this indicator provides the details of the adjustment.
- If the adjustment does not pass validations, this will show as **yellow** or **red** to communicate that there is an **exception** or **error** in the adjustment row.
- The Details screen will tell you which Validations the adjustment did not pass.

**Details**

Details

Name:  SSN:  Work Status:

Wage Type:

Validation Messages

Tools	Validation Message	Validation Type
	Contribution rate should be 7.5%	Warning
	Wage type [SA] does not match member contract [PD]	Error

**Detail**

01 - MASTER A

Delete Selected

Actions	Name/SSN
	ELK, JAN
	LTEST, STAN

# Fixing an Error or Exception

Add Member		Delete Selected															
Tools	Actions	Name/SSN	SSN	Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS	
<a href="#">Actions</a>	 	ELK, JANE	435-01-0041	10/10/1980	Payroll ...	Yes	Yes	2018	Hourly	ACTIVE - A...	\$500.00	\$0.00	\$0.00	\$0.00	\$37.50		
<a href="#">Actions</a>	 	LTEST, STAN	435-01-0050	10/10/1980	Payroll ...	Yes	Yes	2018	Per Diem	ACTIVE - A...	\$500.00	\$0.00	\$0.00	\$0.00	\$36.50		

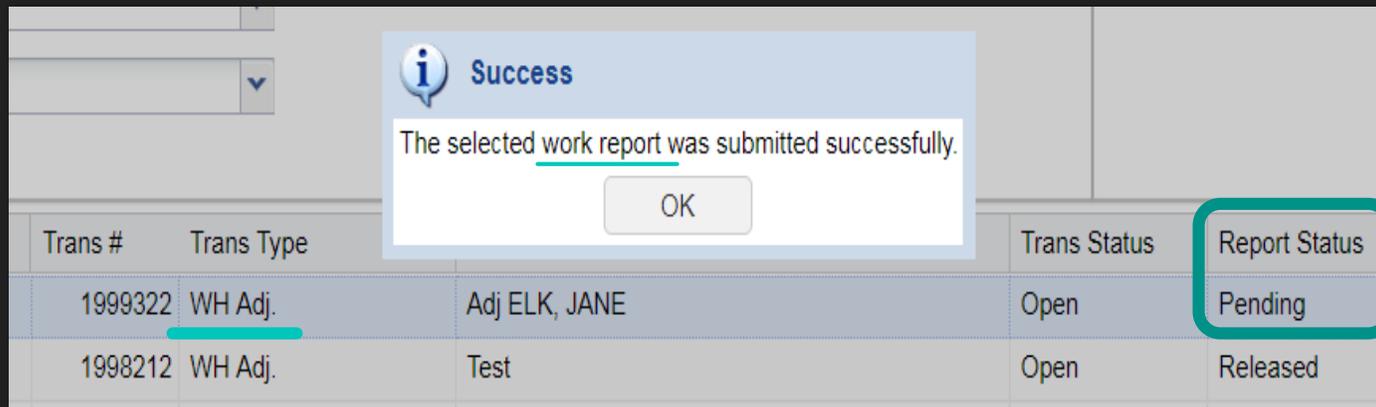
- Double click inside the field that needs to be corrected. Click Apply to apply changes.
- LTEST, Stan is a Per Diem member, not Salaried, and this correction has been made.
- The Yellow indicator stills show because the contributions are incorrect.
- Also in the Actions section is a Comment box. You may enter a comment to explain why the adjustment was necessary.
- When your adjustment corrections are complete, Click Save in the top left of the screen.

# Approving your adjustment

Tools	Posting Date	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Emp Share Bal...	En
Actions	02/17/2018	02/17/2018	1999322	WH Adj.	Adj ELK, JANE	Open	Initial		\$317.40	
Details	18	02/02/2018	1998212	WH Adj.	Test	Open	Released		\$952.20	
Edit	18	01/01/2018	1998211	WH Report	Billing Rpt 2018-01	Open	Released	03/02/2018	\$8,252.40	
Submit										
Delete										

- Clicking Save returns you to the Account tab. Your new adjustment displays as the most recent transaction.
- Similar to the work history report, you may click Details or Edit to view the adjustment details or make changes.
- The Report Status displays as Initial. Click the Actions button for the **Submit** option to approve this adjustment.

# Success message



The screenshot shows a software interface with a success message dialog box overlaid on a table. The dialog box has a blue header with an information icon and the word "Success". The message text reads "The selected work report was submitted successfully." with an "OK" button below it. The table below has five columns: "Trans #", "Trans Type", "Adj", "Trans Status", and "Report Status". The first row is highlighted with a red underline under "WH Adj." and a red box around "Pending" in the "Report Status" column. The second row shows "Released" in the "Report Status" column.

Trans #	Trans Type	Adj	Trans Status	Report Status
1999322	WH Adj.	Adj ELK, JANE	Open	Pending
1998212	WH Adj.	Test	Open	Released

- You will receive a Success message when your adjustment is submitted successfully. The message may be misleading because it states “work report”. This transaction is still coded as “WH Adj” or work history adjustment.
- Click the OK button to move onto your next transaction.
- The Report Status has changed to Pending and will updated to Released when the system runs the release batch next.

# Welcome to the Employer Self-Service (ESS) Training Session!

- When prompted, please dial in to hear the presentation.
- Please mute your phone to be sure that others cannot hear you during the presentation.
- A 5 minute intermission will be provided about 1 hour into the session.
- Questions may be asked using the Q & A feature and will be answered by ESC staff.
- After training sessions are completed we will post information to the PSERS website:
  - FAQ Resource using the questions you've asked.
  - A clean recording of this webinar presentation.
  - A PowerPoint resource that may address some of your questions as you learn to use ESS after go-live
- Our go-live date is set for the last week of March 2018. More information will be provided as we get closer to that date.
- Thank you for attending this training! We will begin shortly.

# Documents Tab

Correspondence, Letters, Reports, Statement of Amount Due (SOAD), and the Employer Statement of Account can all be found here.

# New Feature: Paperless Delivery

- All employers are part of **Paperless Delivery**, meaning that PSERS documents will be electronically sent via email rather than coming to your office on paper. Contact Roles must be kept up to date so documents can be electronically delivered. We will discuss contact updates in more detail soon.
- When a new document is available, the contact person who is designated to receive that type of document will receive an email to alert them that there is a new document waiting for them.
- Older documents will be converted into the new system, but they may not be available to review as an Excel file.
- Documents like the Statement of Account Due (SOAD) can be printed and mailed to PSERS with your lump POS payment check.

# Documents Tab



**PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM**  
TOM WOLF, GOVERNOR | GLEN GRELL, EXECUTIVE DIRECTOR

9498-SMART START CYBER CS

Home Profile Account Roster Documents Contacts Admin

Documents

	<input type="checkbox"/>	Name	Received Date	Scan Date	Date	Type	Recipient	Description	Status
<a href="#">Actions</a>	<input type="checkbox"/>	<a href="#">Breakdown of Service to Employer</a>	01/11/2018		01/11/2018	Doc-Out	SMART STAR...		Printed
<a href="#">Actions</a>	<input type="checkbox"/>	<a href="#">New Charter School Letter</a>	12/07/2017		12/07/2017	Doc-Out	SMART STAR...		Printed
<a href="#">Actions</a>	<input type="checkbox"/>	<a href="#">New Charter School Letter</a>	12/07/2017		12/07/2017	Doc-Out	SMART STAR...		Printed
<a href="#">Actions</a>	<input type="checkbox"/>	<a href="#">New Charter School Letter</a>	11/01/2017		11/01/2017	Doc-Out	SMART STAR...		Printed

- Your Documents Tab is where PSERS letters, informational correspondence, Statements of Account Due (SOADs), the Employer Statement of Account, and some Reports can be found.

# Documents Tab Actions

- The Actions button at the beginning of each row will show available options when viewing the document. For most documents, Details will be the only action available. This allows you to view the correspondence that was sent to you electronically.

<input type="checkbox"/>	Name	Received Date	Scan Date	Date
<a href="#">Actions</a>	<input checked="" type="checkbox"/> Breakdown of Service to Employer	01/11/2018		01/11/2018
<a href="#">Details</a>	Charter School Letter	12/07/2017		12/07/2017

# Details Action

- Click the Details button.
- This opens the Breakdown of Service documents that was sent from PSERS to you. The document should look just as it does in the paper version.
- You can Print the document using the Print button in the top left corner.

Doc-Out

Print

1 of 1 90%

 COMMONWEALTH OF PENNSYLVANIA  
**PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM**

PSERS  
5 N 5th Street  
Harrisburg PA 17101-1905

**Toll-free:** 1.888.773.7748 (1.888.PSERS4U)  
**Local:** 717.787.8540  
[www.psers.state.pa.us](http://www.psers.state.pa.us)

January 11, 2018

SMART START CYBER CS  
123 STRAWBERRY SQAURE  
HARRISBURG, PA 17101

Dear Sir or Madam:

The Public School Employees' Retirement System (PSERS) records show that you requested a breakdown of service for the following member(s):

Member Name	Member SSN	Enrollment Date	Total Credited Service	Service Credits As Of

The attached report is a detailed breakdown of each member's service credits. Any partial years of credit and/or adjustments that have been made to each member's account are listed separately.

If you have any questions, please contact the Employer Service Center by calling toll-free 1.866.353.1844. Harrisburg local callers, please use 717.787.1755. For your convenience, the Employer Service Center is staffed each business day from 7:30 a.m. to 4:00 p.m.

Sincerely,

*Public School Employees' Retirement System*

# Sorting your Documents Tab

Date	Type	Recipient	Description	Status
01/11/2018	Sort Ascending	RT STAR...		Printed
12/07/2017	Sort Descending	RT STAR...		Printed
12/07/2017	Columns	RT STAR...		Printed
11/01/2017	Filters			

January 2018						
M	T	W	T	F	S	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today

- Similar to the other tabs, the identifiers in the header row of the Documents tab have the ability to be sorted according to your preference.
- To do this, hover above the right side of the identifier. This populates a pull down menu that displays your viewing or sorting options.
- For example, the Date column can be sorted from most or least recently received documents. The filter can be set further to find items before, after, or on a particular date.

# Sorting by particular document type

<input type="checkbox"/>	Name	Received Date	Scan Date	Date	Type
<a href="#">Actions</a>	<input checked="" type="checkbox"/> Breakdown of Service to Employer	A↓ Sort Ascending		01/11/2018	De
<a href="#">Actions</a>	<input type="checkbox"/> New Charter School Letter	Z↓ Sort Descending		12/07/2017	De
<a href="#">Actions</a>	<input type="checkbox"/> New Charter School Letter	Columns		12/07/2017	De
<a href="#">Actions</a>	<input type="checkbox"/> New Charter School Letter	Filters		Enter filter text...	De

- The Name column can be sorted alphabetically. Or, a filter option can be used to locate a particular type of document by entering text in the filter box.
- The word “New” entered in the filter text box would bring up on documents that displayed “New” in their title.

# Employer Statement of Account (SOA)

Newly formatted, your Employer SOA information can now be found in two documents.

# Employer SOA Documents

	Home	Profile	Account	Roster	<u>Documents</u>				
<a href="#">Documents</a>									
	<input type="checkbox"/>	Name	Received Date	Scan Date	Date	Type	Recipient	Description	Status
<a href="#">Actions</a>	<input type="checkbox"/>	<a href="#">Employer Statement of Accounts</a>	02/01/2018		02/01/2018	Doc-Out	SMOKEY PIN...		Printed
<a href="#">Actions</a>	<input checked="" type="checkbox"/>	<a href="#">Employer SOA Detail Report</a>	02/01/2018		02/01/2018	Doc-Out	SMOKEY PIN...		Printed
<a href="#">Actions</a>	<input type="checkbox"/>	<a href="#">Employer Contract Record - Fol...</a>	01/06/2018		01/06/2018	Doc-Out	SMOKEY PIN...		Printed
<a href="#">Actions</a>	<input type="checkbox"/>	<a href="#">Employer Contract Record - Fol...</a>	12/07/2017		12/07/2017	Doc-Out	SMOKEY PIN...		Printed

- Your Employer Statement of Account is available on the 1<sup>st</sup> of every month. This statement has been reformatted and broken down into two different documents.
- Employer Statement of Accounts is a Summary of beginning and end of month balances.
- Employer SOA Detail Report will provide the details on the transactions that occurred since your last statement.

# Employer Statement of Accounts

Commonwealth of Pennsylvania – Public School Employees' Retirement System

5 N 5th Street  
 Harrisburg PA 17101-1905  
 Toll-free: 1.888.773.7748  
 Fax: 717.772.3860  
 www.psers.state.pa.us

## Employer Statement of Accounts January 2018 Statement



Mail Center

SMOKEY PINES SD  
 111 FIREPIT LN  
 BEVERLY HILLS, CA 90210

**Billing Statement**

Period: 01/01/2018 to 01/31/2018

Current Date: 02/01/2018

Employer Code: 3404  
 Monthly Activity

POST DATE	TRANS #	TRANS TYPE	PAYMENT TYPE	TRANS IDENTIFIER	TRANSACTION AMOUNT	MEMBER CONTRIBUTIONS	MEMBER POS	EMPLOYER CONTRIBUTIONS	EMPLOYER POS
01/01/2018				Beginning Balance	2,241.70	287.50	0.00	1,954.20	
01/18/2018	1969727	WH Report		Billing Rpt 2018-01	3,205.60	600.00	0.00	2,605.60	
01/31/2018				Ending Balance	5,447.30	887.50	0.00	4,559.80	

As a reminder, payments for member contributions are due no later than 10 days after the close of the month for which deductions were withheld. Payments for employer contributions are due quarterly and no later than 5 business days after the Retirement Subsidy reimbursement is paid by the Commonwealth. Payments are due for Employer Purchase of Service no later than 90 days from the Statement of Amount Due generation date.

If payments are not remitted by the established due dates, delinquent amounts may be deducted from your Retirement Reimbursement Subsidy and/or your Basic Education Subsidy.

- This one page document provides the beginning and ending balances for the specified time period.

# Employer SOA Detail Report

## DETAILED Billing Statement

Employer Code: ██████████

Period: 01/01/2018 to 01/31/2018

Current Date: 02/01/2018

POST DATE	TRANS #	TRANS TYPE	PAYMENT TYPE	TRANS IDENTIFIER	APPLIED TO	TRANSACTION AMOUNT	MEMBER CONTRIBUTIONS	MEMBER POS	EMPLOYER CONTRIBUTIONS	EMPLOYER POS
07/27/2016	1578349	SCP Employer Contribution		Lump POS: SSN ██████████-7716: POS 555031		69.03	0.00	0.00		69.03
08/08/2017	1719269	WH Report		Billing Rpt 2017-07		496,551.82	93,732.58	198.72	402,620.52	
09/08/2017	1728324	WH Report		Billing Rpt 2017-08		493,746.18	93,023.89	198.72	400,523.57	
10/02/2017	1737615	SCP Employer Contribution		Lump POS: SSN ██████████-7654: POS 581439		526.23	0.00	0.00		526.23
10/06/2017	1739413	WH Report		Billing Rpt 2017-09		974,277.50	183,919.19	563.26	789,795.05	
11/14/2017	1966386	WH Report		Billing Rpt 2017-10		958,696.58	180,910.68	563.26	777,222.64	
11/14/2017	1966387	WH Adj.		Z COOPER SERVICE ADJ 10/31/17		200.35	37.50	0.00	162.85	
12/19/2017	1968879	WH Report		Billing Rpt 2017-11		400.70	75.00	0.00	325.70	
01/31/2018		Ending Balance				2,924,468.39	551,698.84	1,523.96	2,370,650.33	595.26

# Employer SOA Detail Report

- The Detail Report will display the Posting Date of the Transaction, the Trans #, the Type of Transaction, and the Transaction Identifier.
- Each row breaks out Member Contributions, Employer Contributions, and POS money from left to right within the same transaction row.
- For payments made, all transaction numbers where money was applied will be listed.
- **NEW: Due dates are not listed on the Detail Report.** Due dates should be mentally calculated based on the posting date of the transaction. Employers will still make payments for employer contributions quarterly. Payments for due for Employer Purchase of Service payments no later than 90 days after the generation of the Statement of Account.

# The fine print...

POST DATE	TRANS #	TRANS TYPE	PAYMENT TYPE	TRANS IDENTIFIER	APPLIED TO	TRANSACTION AMOUNT	MEMBER CONTRIBUTIONS	MEMBER POS	EMPLOYER CONTRIBUTIONS	EMPLOYER POS
-----------	---------	------------	--------------	------------------	------------	--------------------	----------------------	------------	------------------------	--------------

As of this statement date, the following monthly work reports are considered delinquent and should be submitted immediately:

OCTOBER 2017

NOVEMBER 2017

DECEMBER 2017

As a reminder, payments for member contributions are due no later than 10 days after the close of the month for which deductions were withheld. Payments for employer contributions are due quarterly and no later than 5 business days after the Retirement Subsidy reimbursement is paid by the Commonwealth. Payments are due for Employer Purchase of Service no later than 90 days from the Statement of Amount Due generation date.

If payments are not remitted by the established due dates, delinquent amounts may be deducted from your Retirement Reimbursement Subsidy and/or your Basic Education Subsidy.

- Delinquent work reports as of the statement generation date will be listed at the end of your SOA.
- Reminders of when payments are due for member and employer contributions, and purchase of service payments are also listed here, as well as consequences for not submitting timely payments to PSERS.

# Contacts Tab

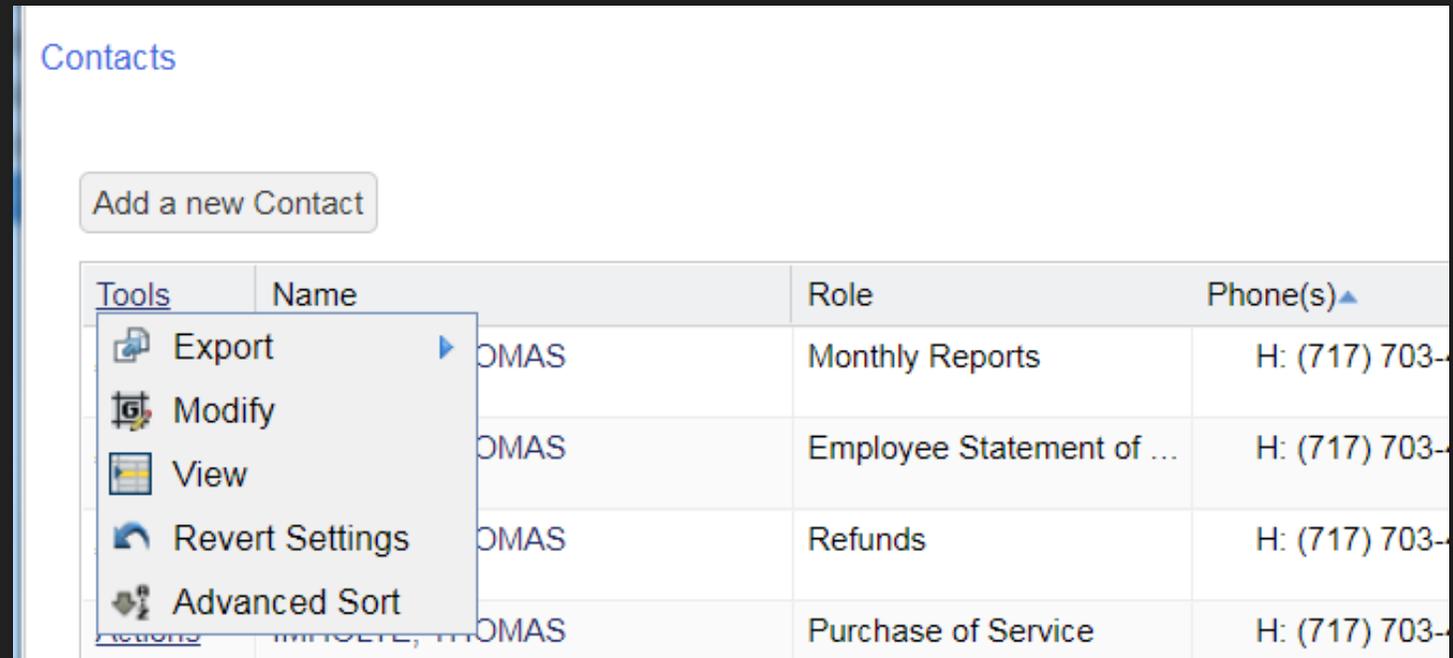
Job Roles and email addresses should be kept up to date by employers in the contact section.

# Contact Roles

- The Name, Role, Phone #, Fax #, Email, Address, Start and Stop Dates are fields that should be filled out for each staff person who is responsible for a particular role.
- PSERS requests that someone **always** be assigned to the role of:
  - Monthly Reports
  - Business Manager
  - Superintendent
- **Each role can only be assigned once** although an individual can hold more than one role.
- **Email addresses must be kept current.** An invalid email address will result in the inability to transmit a document to your Documents Tab using the Paperless Delivery method.
- All employers are automatically enrolled in Paperless Delivery.

# Sorting the Contacts Tab

- Similar to the other tabs, the Tools button at the top left of your contacts area will offer options to Export, View, or initiate an Advanced Sort of your contacts.
- If you choose to sort or filter any specific columns, the Revert Settings option will bring your Contacts Tab back to the default setting.
- Contact roles have a start and stop date. **When updating roles, you must end date the role for the current holder before creating a new contact for that role.**



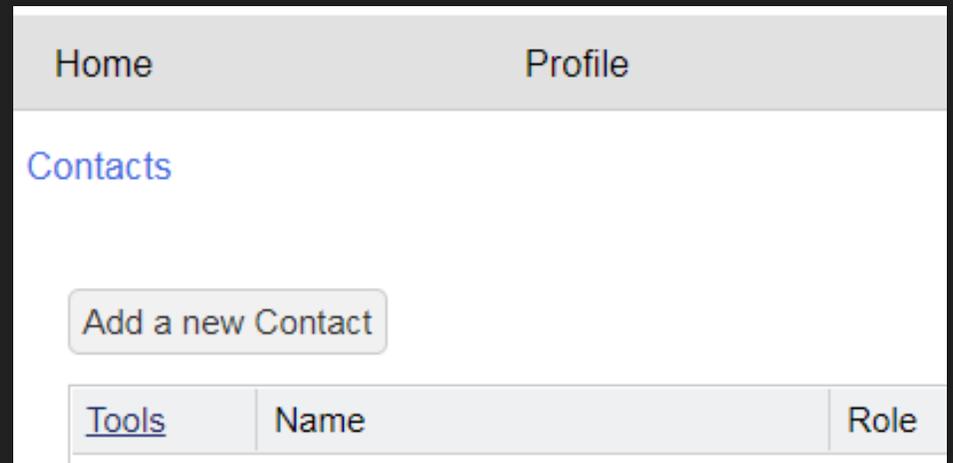
Contacts

Add a new Contact

Tools	Name	Role	Phone(s)▲
Export	OMAS	Monthly Reports	H: (717) 703-
Modify	OMAS	Employee Statement of ...	H: (717) 703-
View	OMAS	Refunds	H: (717) 703-
Revert Settings	OMAS	Purchase of Service	H: (717) 703-
Advanced Sort	OMAS		

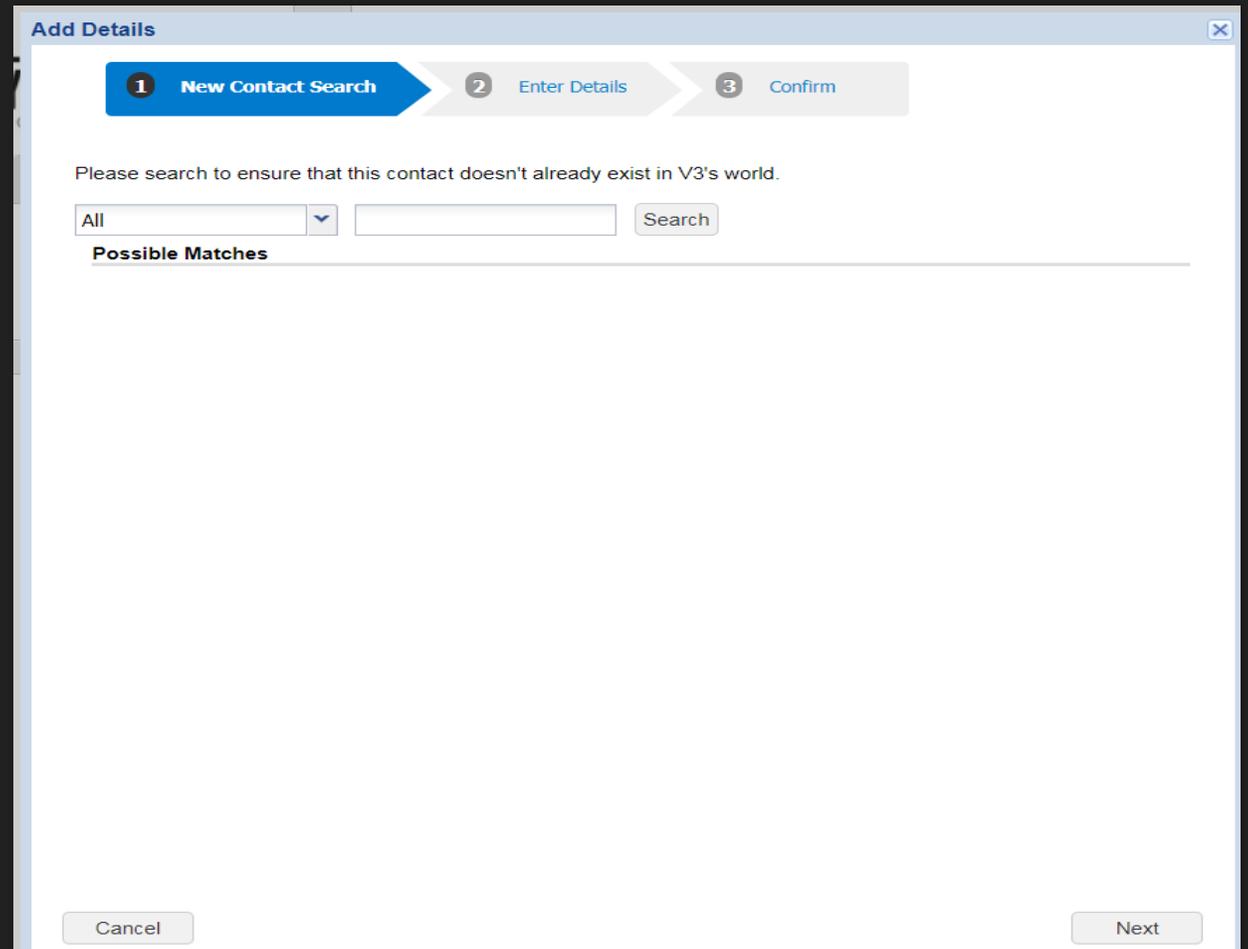
# Adding a new Contact

- Click the Add a new Contact button in the top left.



# Add Details Screen

- The Add Details screen will appear when you click the Add a new Contact button.
- Step 1 is New Contact Search. The system is searching for possible matches for existing contact information.



The screenshot shows a dialog box titled "Add Details" with a close button in the top right corner. At the top, there is a progress indicator with three steps: "1 New Contact Search" (highlighted in blue), "2 Enter Details", and "3 Confirm". Below the progress indicator, the text reads: "Please search to ensure that this contact doesn't already exist in V3's world." There is a search input area with a dropdown menu set to "All", a text input field, and a "Search" button. Below the search area, the text "Possible Matches" is displayed, followed by a horizontal line. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Next" on the right.

# Step 1: New Contact Search

- Enter your contact's name in the search box and click Next at the bottom right.

**Add Details**

1 **New Contact Search** 2 Enter Details 3 Confirm

Please search to ensure that this contact doesn't already exist in V3's world.

All  Search

**Possible Matches**

---

# Contact search

- Because John Pink is already a user in the system, his name was found as a match in the system.
- Select the all caps match that was found by the system and click Next.
- If the name of the person searched was not found, select Add Individual.

**Add Details**

1 New Contact Search → 2 Enter Details → 3 Confirm

Please search to ensure that this contact doesn't already exist in V3's world.

All  Search

**Possible Matches**

<u>Tools</u>	Name	Alt Key Code
	PINK, JOHN	9116293

# Step 2: Enter Details

- The contact's name and PSERS ID is populated by ESS.
- The contact's Role, start date, phone number, email address and Correspondence address should also be completed.
- The field titled "Member-provided email" is misleading. The contact person's **school email address** should be filled in this field. **This is necessary to receive electronic documents and other PSERS communication.**

The screenshot shows a web form titled "Enter Details" as part of a three-step process: 1. New Contact Search, 2. Enter Details, and 3. Confirm. The form contains the following fields:

- Prefix: [Dropdown]
- First Name: [Text: JOHN]
- Middle Name: [Text]
- Last Name: [Text: PINK]
- Suffix: [Dropdown]
- Role: [Dropdown]
- Start Date: [Text: mm/dd/yyyy]
- Stop Date: [Text: mm/dd/yyyy]
- PSERS ID: [Text: 9116293]
- Day Phone: [Text] Ext: [Text]
- Evening Phone: [Text] Ext: [Text]
- Other Phone: [Text] Ext: [Text]
- Member-Provided Email: [Text] (highlighted with a red box)
- Fax: [Text]
- Correspondence: [Text]

# Selecting a Role

- The Role is a mandatory field. Each role may only be assigned once, although more than one role can be assigned to a person.
- The pull down menu should be used to view roles.
- There should always be a current person assigned to the roles of Monthly Reports, Business Manager, and Superintendents.
- If the role you selected is already held by another person, you will receive an error message telling you that it is unavailable.

1 New Contact Search 2 Enter Details 3 Confirm

Prefix:  Role:

First Name:

Middle Name:

Last Name:

Suffix:

Start Date:

Stop Date:

PSERS ID:

Day Phone:  Ext:

Evening Phone:  Ext:

Other Phone:  Ext:

Member-Provided Email:

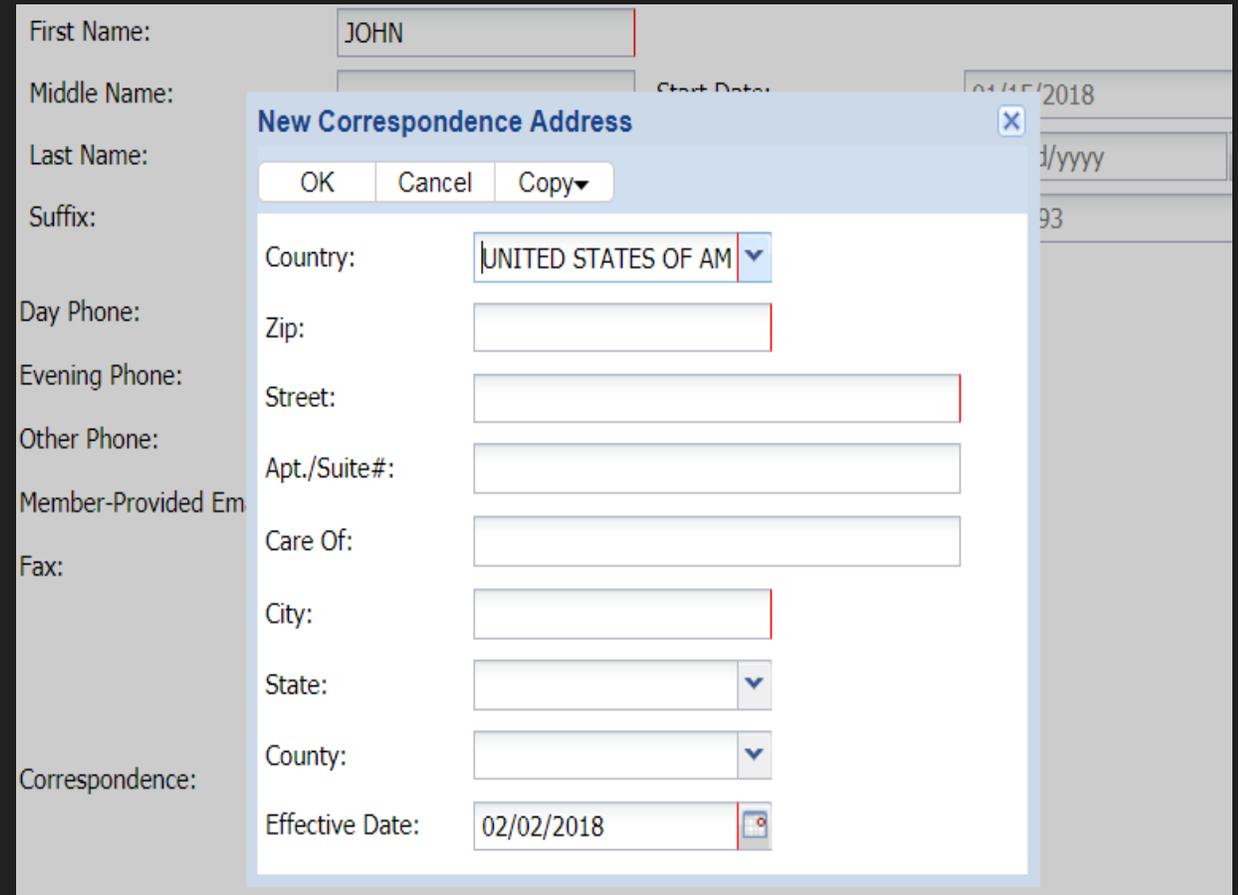
Fax:

Role Selection Menu:

- Monthly Reports
- Employee Statement of Account
- Employer Statement of Account
- Member Demographics/Contracts
- Employer Newsletter
- Purchase of Service Receivables
- Purchase of Service Refunds
- Retirements
- Member Newsletter
- Business Manager
- Superintendents
- Information Technology
- Healthcare

# Start Date and Address

- The Start date should be entered as the date the contact took over the role you are assigning.
- The Correspondence Address should be the address your school receives mail. This may not be the same address as the physical location of your business office.
- Entering the zip code will populate the city and state. The effective date will automatically use the current date but is editable.
- Click the OK button when address is completed.



The screenshot shows a web form with a modal window titled "New Correspondence Address". The background form has fields for First Name (JOHN), Middle Name, Last Name, Suffix, Day Phone, Evening Phone, Other Phone, Member-Provided Em, Fax, and Correspondence. The modal window has buttons for OK, Cancel, and Copy. It contains the following fields: Country (dropdown menu showing UNITED STATES OF AM), Zip, Street, Apt./Suite#, Care Of, City, State (dropdown menu), County (dropdown menu), and Effective Date (text input showing 02/02/2018).

# Step 3: Confirm

**Add Details**

1 New Contact Search → 2 Enter Details → 3 **Confirm**

Prefix:		Role:	Monthly Reports
First Name:	JOHN	Start Date:	01/15/2018
Middle Name:		Stop Date:	
Last Name:	PINK	PSERS ID:	9116293
Suffix:			
Day Phone:	<input type="text" value="(717) 234-7890"/>	Ext:	<input type="text"/>
Member-Provided Email:	<input type="text" value="jpink@yourschool.com"/>		
Correspondence:	<input type="text" value="123 SESAME ST&lt;br/&gt;HARRISBURG PA 17101"/>		

# Admin Tab

Only persons with an Administrator account will see this tab.

# Admin Tab

The screenshot displays the 'Admin' tab interface. At the top, there is a navigation bar with tabs for Home, Profile, Account, Roster, Documents, Contacts, and Admin (which is underlined). Below the navigation bar, the 'Admin' section is visible. It contains a 'Filters' section with three dropdown menus: 'Billing Location' set to 'All', 'Search' with a search box containing 'Search' and a clear button, and 'Status' set to 'All'. To the right of the filters is an 'Actions' section with an 'Add User' button. Below the filters and actions is a table header with the following columns: [Tools](#), User Name, Full Name, Status, Created On, Registered, Email, and PSERS ID.

- The Admin tab displays persons who have ESS access either with an Admin account or a User account.
- Your school name will populate in the Billing Location field.
- You can search for a particular person or a specific status (All, Active, Inactive, Locked)

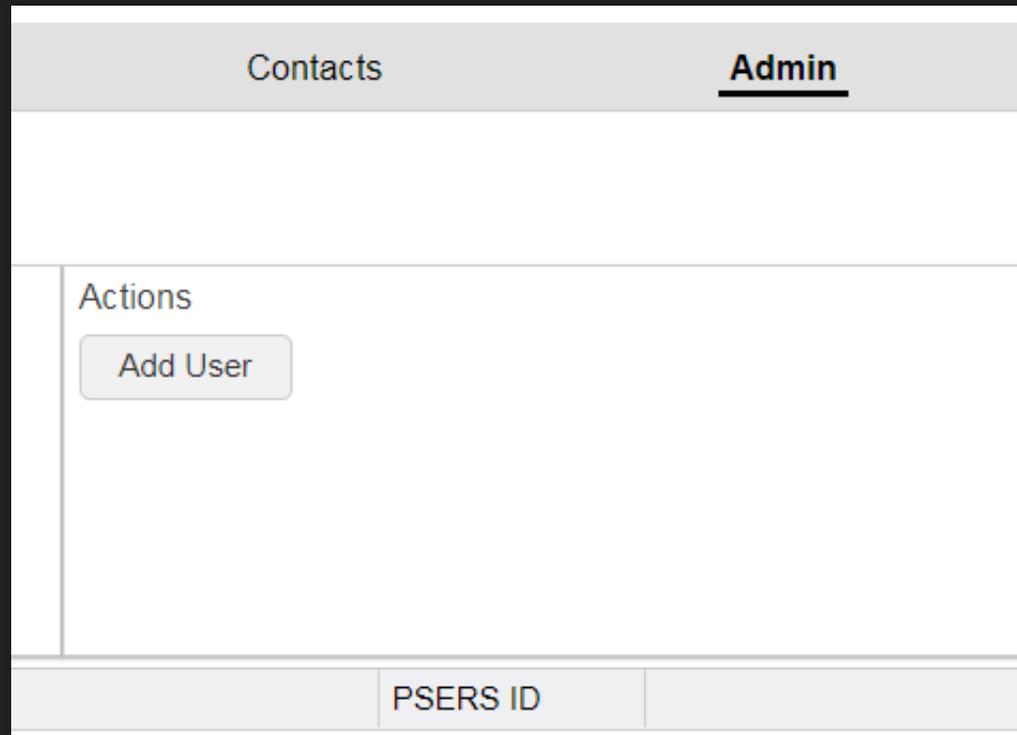
# Converting to Browser: Admins only!

- Persons with Admin accounts will have their username and passwords converted to the new ESS Browser system.
- You must know your password; this information will be requested the first time you sign into ESS.
- After your username and password are entered, the system will prompt you to change your password.
- After your school's admin has successfully registered, they can start creating User Accounts.
- PSERS encourages the Admin(s) at your school to **register as soon as possible** after ESS goes live so your school can begin reporting and learning the new system. This will be the last week of March 2018.

# After Go-Live Admin account info

- New employees who require an ESS Administrator account should submit a PSERS Employer Security Administrator Authorization (PSRS-1270) form.
- Please be sure to check the box indicating “Create Employer Security Administrator” and sign the form when requesting access.
- If someone with an Admin account leaves your school and will not need access any longer, please submit the same form and check the box to indicate “Delete Employer Security Administrator”.
- This form is available on your ESS Dashboard under the Forms section, is located on the public website under the Employer tab, or can be requested from your ESC representative.
- When completed, please fax form to the number listed on the form so it can be processed quickly.

# Creating a User account



- Click the Add User button at the top right of your screen.

# Step 1: Search

- Step 1 of the Add User process is to search the system for the new user's name.
- Both First Name and Last Name are mandatory fields.
- When the name is entered click the Go button, or click Next at the bottom right of the page.

Add User

1 Search 2 Account Info 3 Access Info 4 Confirmation Info

Please enter the new user's name

First Name:  !

Last Name:

Go

# Step 1 continued

**Add User**

1 Search 2 Account Info 3 Access Info 4 Confirmation Info

Please enter the new user's name

First Name:

Last Name:

Please select the new user from the list below. If the new user does not exist in the list below, click New.

<a href="#">Tools</a>	Name	SSN	Address
No matches found.			

- If any matches are found they will populate on the screen.
- This new user's name was not found. Click the New button at the bottom of the page to move to step 2.

# Step 2: Account Info

- The user's name and user ID name will populate inside the boxes for step 2.
- An email address must also be entered.
- Please also enter a Day Phone; the PSERS ID will be assigned by the system.
- Click Next at the bottom of the screen to move to step 3.

**Add User**

1 Search → **2 Account Info** → 3 Access Info → 4 Confirmation Info

Please ensure that the below information is complete and accurate.

First Name:

Last Name:

User:

E Mail:

If the fields below do not contain a value, please enter a Day Phone number to continue.

PSERS ID:

Day Phone:  Ext:

# Step 3: Access Info: Which one??

- The User's Account Access will default to the first option: Employer including all Reporting Units.
- The Employer User box is automatically checked but ESS Home Page will also need to be selected for the user to be able to navigate ESS.

**Add User**

1 Search → 2 Account Info → **3 Access Info** → 4 Confirmation Info

User's Account Access (contact PSERS to change):

- Employer including all Reporting Units
- Specific Reporting Units under the Employer
  - 3404-SMOKEY PINES SD (Employer)
  - 3404 SMOKEY PINES SD

Please select "Employer User" and "ESS Home Page" below (contact PSERS for other security profiles):

- Employer User
- ESS Read Only - ESS\_READ\_ONLY
- ESS Home Page

# Error due to not selecting ESS Home Page

The screenshot shows a web application window titled "Add User" with a progress bar at the top containing four steps: 1 Search, 2 Account Info, 3 Access Info (highlighted in blue), and 4 Confirmation Info. Below the progress bar, there are two sections of radio button options. The first section is titled "User's Account Access (contact PSERS to change):" and contains three options: "Employer including all Reporting Units" (selected), "Specific Reporting Units under the Employer" (unselected), and "3404 SMOKEY PINES SD" (unselected). The second section is titled "Please select 'Employer User' and 'ESS Home Page' below (contact PSERS for other security profiles):" and contains three options: "Employer User" (checked), "ESS Read Only - ESS\_READ\_ONLY" (unselected), and "ESS Home Page" (unselected). At the bottom of the window, an error message is displayed in a light blue box with a red 'X' icon. The error text reads: "Please select both 'Employer User' and 'ESS Home Page' in the security profile section, and no other security profiles. If another security profile is needed, contact PSERS." Below the error message is an "OK" button.

- If you do not select the ESS Home Page access, you will receive an error that states that both "Employer User" and "ESS Home Page" both need to be selected to complete the security profile.

# Correct security selected

## Add User

- 1 Search
- 2 Account Info
- 3 Access Info
- 4 Confirmation Info

User's Account Access (contact PSERS to change):

- Employer including all Reporting Units
- Specific Reporting Units under the Employer
  - 3404-SMOKEY PINES SD (Employer)
  - 3404 SMOKEY PINES SD

Please select "Employer User" and "ESS Home Page" below (contact PSERS for other security profiles):

- Employer User
- ESS Read Only - ESS\_READ\_ONLY
- ESS Home Page

- When these boxes are successfully check marked, click the Next button at the bottom right of the screen to move to Confirmation Info.

# Step 4: Confirmation Info

- Review data entered carefully before clicking Confirm at the bottom right.
- Your new user should have both Employer User and ESS Home Page as part of their Security Profile.

**Add User**

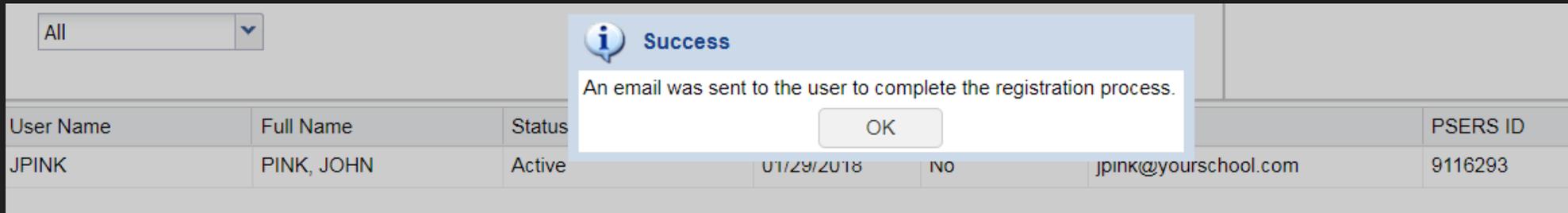
1 Search → 2 Account Info → 3 Access Info → **4 Confirmation Info**

Please confirm the details below.

First Name:	John	
Last Name:	Pink	
User:	JPink	
E Mail:	jpink@yourschool.com	
Date of Birth:		
PSERS ID:		
Day Phone:	(355) 223-4567	Ext:
Evening Phone:		Ext:
Other Phone:		Ext:
Account Access:	Access to Employer including all accounts	
Security Profile:	Employer User	
	ESS Home Page	



# Confirmation Success



The screenshot shows a user management interface. At the top left, there is a dropdown menu with 'All' selected. A success message dialog box is overlaid on the table, stating 'Success: An email was sent to the user to complete the registration process.' with an 'OK' button. Below the dialog is a table with the following data:

User Name	Full Name	Status				PSERS ID
JPINK	PINK, JOHN	Active	01/29/2018	NO	jpink@yourschool.com	9116293

- A confirmation message will appear on your screen.
- The User will receive a registration email that will contain a link for that person to create a password for the system.

# Registration Process

<a href="#">Tools</a>	User Name	Full Name	Status	Created On	Registered	Email	PSERS ID
<a href="#">Actions</a>	JPINK	PINK, JOHN	Active	01/29/2018	No	jpink@yourschool.com	9116293

- The Administrator creating the User account should provide the PSERS ID number to the User. This will be used in the registration process after the User receives the registration email.
- The PSERS ID is displayed on the far right and is a system generated number.
- Once registered, the User will be able to be using ESS for reporting. Completing the registration process will change the Registered status to “Yes” in the system.
- Users will also be required to change their passwords every 120 days.

# User Actions Button

<u>Tools</u>	User Name	Full Name
<u>Actions</u>	JPINK	PINK, JOHN
Update User Access		
View Login History		
Change User Details		

- Clicking the Actions button for a User allows you to Update User Access, View Login History (after registration is complete), and Change User Details.

# Change User Details

- Change User Details will be the most commonly used action.
- Selecting this option opens the Demographics page.
- Click the Apply button, then Save, after changes have been made to the User's Demographic Information.
- Similar to contacts, A role needs to be assigned to the user as well as start and stop dates.
- A user who is no longer worked for your school or needs access to ESS should enter a stop date to deactivate their account.

# Employer Service Center Regions

The Employer Service Center (ESC) has six representatives to serve PSERS reporting units across the Commonwealth of Pennsylvania.

# ESC

## Representatives

Toll-free Phone:  
1.866.353.1844

Region 1: Glenda Lopez-Rodriguez

Region 2: Crystal Houser

Region 3: Jonathan Malnick

Region 4: Carolina Baez

Region 5: Mike Chappuis

Region 6: Julius Davin (March 2018)

